THE IMPORTANCE OF STATE FUNDING FOR QUALITY EDUCATION: SOUTH AFRICAN PERSPECTIVE

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ABSTRACT

Before 1994, South Africa had sixteen education departments which were divided according to race and ethnicity. South Africa amalgamated all these departments after the dispensation of democracy in 1994. Then funding of education was also determined according to race and ethnicity. In order to amalgamate different departments, parliament promulgated National Education Policy Act 24 of 1996. Parliament went further to promulgate South African Schools Act 84 of 1996. In terms of Section 34 (1) of South African Schools Act 84 of 1996 the state must fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of the learners to education and the redress of past inequalities in education provision. Therefore the minister in terms of Section 35 South African Schools Act 84 of 1996 was assigned to determine norms and standards for the funding of public schools after consultation with the Council of Education Ministers, the Financial and Fiscal Commission and the Minister of Finance. This paper will explore on whether South African Norms and Standards for School Funding Policy is addressing the imbalances of the past which are equity, equality and access in order to add value to quality education provision.

Keywords: policy, equity, quality, access

INTRODUCTION

There have been major changes in the state of South African schools, but there are also deep continuities with the past. It is no accident that the poorest provinces with the poorest schools are those that incorporate former homelands. The current state of the schools in those provinces is closely intertwined with the twists and turns of the history of apartheid over more than two centuries. It is also linked to present dynamics and social forces unleashed by democratization of South African society, as well as to the evolving nature of education itself, a system that is slow to change and so embedded in the tensions, stresses and strains of society itself that there is a continuous contradiction between its intentions and outcomes. This combination of history, contemporary dynamism and the character of the education system itself must go some way towards explaining both success and failure (Chisholm, 2005:203). According to Malherbe (1977:535) education, like any other public or private service, has a twofold economic aspect:

• Where does the money come from to pay for it? -and

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- What spiritual and material returns can be expected from the money so invested?
- According to Classen (1995:487), the financing of education is a crucial component of any education system, as the entire system (that is, schools, policies and administration) is dependent on funds in order to function. In 1994 the South African Government of National Unity, led by the African National Congress, launched its Reconstruction and Development Programme (RDP) as a welfarist, social democratic or socialist initiative aimed at redressing the legacy of social and economic injustices and inequities of the apartheid era (Kallaway, 1997:35). The programme was aimed at redressing inequality, including in the education system. Kallaway interprets RDP policy as a policy which determines the caring for people, especially those in formerly disadvantaged communities, so that the policy was about redressing the imbalances of the past.

RESEARCH QUESTIONS

The central problem that this research project attempts to answer revolves around the following question: Which model of funding can be used in South Africa in order to redress the imbalances of the past which are equity, equality, adequacy and access for provision of quality education? Thus, the research question can be subdivided the following sub-questions:

- 1. How does the implementation of Norms and Standards of funding impact on the provision of quality education and redress the past imbalances in South Africa?
- 2. What are the challenges experienced by public schools in the implementation of the current public funding policy on the provision of quality education?

REVIEW OF LITERATURE

To start with Baron (2013) states that the purpose of literature review is to provide the reader with a comprehensive review of the literature related to the problem under investigation. The review of related literature should greatly expand upon the introduction and background information presented in the proposal.

South Africa's Pre-Democratic Era

According to Fataar (1997:74), the existing pattern of provision of schooling in South Africa is the outcome of a history of colonialism, segregation and apartheid. Its vision can be traced back to the first colonial conquest by the Dutch East Indian Company in the mid-seventeenth century. From the earliest times education was configured along race, class and geographic lines. Generally the best available education was provided for the landed urban white classes, while rural whites (generally Afrikaners) provided mainly religious schooling for their children. African schooling was the most neglected, and missionary schools of various dominations and European origins remained the dominant form of schooling for Africans. However, as the demand for schooling increased, missionary societies became increasingly unable to fund schools adequately. The primary aim of missionaries was in any case to evangelise. Education

was seen as a means of accomplishing this aim which, in most cases, resulted in the founding of schools and educational institutions linked to the mission stations (Lewis & Lemmer, 2004:58).

Education Legislation Since 1994

According to Chisholm (2005:205) there can be little doubt that there have been major changes since 1994. In the first two years after 1994, racially divided departments were restructured into one national and nine provincial departments. There was a drive to unify education departments, which were fragmented according to race and ethnicity, into one department. Commissions were appointed and White Papers were debated and passed in parliament. The commissions came up with recommendations on how education could be unified and how equity could be achieved.

White paper on Education and Training

The White Paper on Education and Training No. 196 of 1995 was published before the drawing up of the final Constitution of 1996. It was formulated after the Interim Constitution of the Republic of South Africa of 1993 introduced Bill of Rights incorporated in the final Constitution of the Republic of South Africa No.108 in 1996 and the Reconstruction and Development Programme of 1994.

Considering the Interim Constitution of the Republic of South Africa of 1993, the White Paper (DoE, 1995:13) describes the purpose and scope of the paper as being the first steps in policy formation by the Ministry of Education in the Government of National Unity. Amongst these first steps, it:

- Previewed important developmental initiatives on which the Ministry of Education was engaged;
- Provided information about how the national and provincial departments of education were to be established;
- Analysed the budget process in education, and the necessity for a strategic approach to education funding in relation to the national priority for human resource development;
- Discussed in detail two significant policy initiatives for the school system: the organization, governance and funding of schools, and the approach to the provision of free and compulsory general education.

The White Paper (DoE, 1995:21-23) committed itself in some of the following:

- Deployment of the state's resources according to the principle of equity, so that they are used to provide essentially the same quality of learning opportunities to all citizens;
- Redress of educational inequalities among those sections of our people who have suffered particular disadvantages;
- The principle of equity, so that resources are used to provide essentially the same quality of learning opportunities for all citizens;

- Dispelling the chronic alienation of large sectors of society from the educational process; and
- Financial sustainability of education and training.

The Constitution of the Republic of South Africa

Under the Bill of Human Rights, this was also in the Interim Constitution of the Republic of South Africa of 1993, in terms of Section 29 (1) (a-b) of South African Constitution, Act 108 of 1996:

- (a) Everyone has the right to basic education, including adult basic education; and
- (b) To further education, which the state, through reasonable measures, must make progressively available and accessible.

The National Education Policy Act (NEPA), 27 of 1996

The National Education Policy Act 27 of 1996 provides for a national policy on education, to amend the National Policy for General Education Affairs Act of 1984 so as to substitute certain definitions, and to provide a new policy on the salaries and conditions of employment of educators, and to provide for matters connected therewith. In terms of Section 3 (4) (c) of the National Education Policy Act 27 of 1996, the Minister shall determine national policy for the planning, provision, financing, co-ordination, management, governance, programmes, monitoring, evaluation and well-being of the education system and, without derogating from the generality of that section, may determine national policy for facilities, finance and development plans for education, including advice to the Financial and Fiscal Commission.

The South African Schools Act (SASA), 84 of 1996

This South African Schools Act was enacted in 1996 and provides a uniform system for the organization, governance and funding of schools, to amend and repeal certain laws relating to schools, and to provide for matters connected therewith. It also specifies the way in which parents should help schools in terms of bringing their children to school and funding their children's education. It also provides guidance on how the state should fund schools.

The South African Schools Act of 1996 calls for all schools to be governed by elected governing bodies made up of all the school's stakeholders, including parents who comprise majority. Each governing body makes recommendations regarding the appointment of all educators, including the principal, and is mandated to take all reasonable measures within its means to supplement the resources provided by the state (Fiske and Ladd, 2002:159).

Norms and standards for school funding Policy

The Minister of Education is given the mandate by the National Education Policy Act (NEPA) 27 of 1996 in terms of Section 3 (4) (c) of determining national policy for financing education. That is why a 'National Norms and Standards for School Funding' is set out in Section 35 of the South African Schools Act (SASA), 84of 1996. This section sets out the national and minimum standards for school funding, and Section 3(4) (g) of NEPA also states that the Minister may determine national policy for the organization, management, governance funding, establishment and registration of the education system.

Considering both these pieces of legislation, the Minister determined the 'National Norms and Standards for School Funding' as gazetted in October 1998 and this became national policy on 1 April 1999 with implementation in 2000 (Nicolaou 2002:95; Karlsson, Mcpherson, & Pampallis, 2002:159). The 'National Norms and Standards' thus established funding procedures which promote equity and redress inequity, within a context of inadequate government spending and increasing parental financial support for education. The document sets out the minimum standards for the public funding of public schools, and exempts parents who are unable to pay school fees.

The 'National Norms and Standards for School Funding' require provincial education departments to prioritise the neediest schools when making decisions about capital expenditure, and to provide higher levels of recurrent non-personnel, non-capital funding for schools in poorer communities. The procedures also provide for governing bodies to give fee exemptions to poorer learners. It does not address educator salaries or provincial education departments' school-level expenditure (Pampallis, 2002:107; Karlsson *et al.*, 2002:159).

The purpose of the procedures is to effect redress and equity in school funding with a view of progressively improving the quality of school education, within a framework of greater efficiency in organizing and providing education services. The procedures indicate the method by which funds are to be distributed according to certain categories. The funding norms recognize that SASA imposes a responsibility on all public school governing bodies to do their utmost to improve the quality of education in their schools by raising additional resources to supplement those which the state provides (Patel, 2002:176).

According to Karlsson *et al.* (2002:159), to bring about redress of inequity among existing schools, provincial education departments are required to direct 60% of the non-personnel and non-capital expenditure towards 40% of the poorest schools in their provinces. In order to implement this, provinces are required to compile a list of schools based on their socio-economic levels of development and physical resources. This 'resource targeting list' will be used to divide schools into five categories based on needs. The framework outlined below provides a guideline for the procedure, detailed further below.

School quintiles from poorest to least	Expenditure allocation (percentage of resources)	Cumulative percentage of schools	Cumulative percentage of non-personnel and non- capital recurrent expenditure	Per learner expenditure indexed to an average of R100
Poorest 20%	35	20	35	175
Next 20%	25	40	60	125
Next 20%	20	60	80	100
Next 20%	15	80	95	75
Least 20%	5	100	100	25

 Table 1: Resource targeting based on condition of schools and poverty of communities

Source: Government GazetteNo. 19347, October 1998:27

According to quintile grouping of schools, the poorest 20% of schools will receive 35% of resources, while the next poorest 20% will receive 25%. The next two categories will receive 20% and 15% respectively. The last 20% of schools, which are largely former Model C and former House of Delegates schools which are regarded as least poor, will receive 5% of resources. The recurrent cost allocation will be used to fund water and electricity bills, maintenance of buildings and the purchase of learning materials equivalent to at least R100 per learner. If provinces lack sufficient funds, priority will be given to the poorest schools.

According to the National Norms and Standards for School Funding gazetted in 1998, the norms deal only with school level expenditure. The norms and minimum standards in the document apply:

- Uniformly in all provinces, and are intended to prevail in terms of Section 146(2) of the South African Constitution; and
- Only to ordinary public schools.

According to the 'National Norms and Standards for School Funding' policy of 1998, the Department of Education is required to undertake its monitoring and evaluation role in the following way:

- In a reasonable manner, with a view to enhancing professional capacities in monitoring and evaluation throughout the national education system, and assisting the competent authorities by all practical means within the limits of available public resources to raise the standards of education provision and performance.
- Each Head of Department will be expected to verify that the national norms are being complied with in allocating funds, or that acceptable alternatives are being implemented, after consultation with the Department of Education. If the Provincial Education Department is unable to comply with the norms because of lack of expertise or for any other reason, the Department of Education must be informed without undue delay, so that the problem can be examined and remedies sought.

• SASA imposes other important responsibilities on the state with respect to funding of public schools. The basic principle of state funding of public schools derives from the constitutional guarantee of equality and recognition of the right of redress. Section 34 (1) of SASA states that the state must fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of the learners to education and the redress of past inequalities in educational provision.

According to the Norms and Standards policy, the Ministry of Education's personnel policy for schools embodies the following principles:

- Schools must be supplied with an adequate number of educator and non-educator personnel;
- Such staff members must be equitably distributed according to the pedagogical requirements of the schools; and
- The cost of personnel establishments must also be sustainable within provincial budgets.

Further according to the policy, in order to make progress towards equity in school funding, each provincial education department must:

- Use relevant provincial data much more intensively in budgeting and planning decisions;
- Develop the necessary data systems to guide planning and allocations; and
- Be able to demonstrate to the Department of Education that progress is being made.

Schools must provide information to provincial education departments. On their part, departments must ensure that information is received on time from schools, so that the necessary analysis can be undertaken, and resource allocation decisions made on time. Provincial Education Departments must annually provide public schools with sufficient information so that the schools' governing bodies can develop their budgets as required by Section 34 of South African Schools Act (SASA) 84 of 1996. It also deals with the procedures to be adopted by provincial education departments in determining resource allocation to their schools.

Conceptual Framework

Since the main focus of this paper is the implementation of policy in funding public education for provision of quality education in South Africa, its conceptualization developed from three constructs: policy implementation, quality education and public basic education. Policy implementation of public funding of public basic education in South Africa should impact on the provision of quality education to target the impoverished groups or citizens of this country. Quality education depends on equity and equality as far as funding is concerned. This is to address and redress the inequality and inadequacy of the past.

Theoretical Constructs

The groundwork for this paper was developed from three theoretical constructs to be discussed below.

Policy Implementation

South Africa is engaged in the task of transforming its politics, economy and social system into a democratic society that offers all racial groups the opportunity to participate fully as citizens, workers, and fulfilled individuals. The most important thing has been the construction of an equitable and democratic education system. The 'Norms and Standards' policy should be an instrument that guides the equitable distribution of resources, such as support services, in all schools (Motala & Singh, 2001:1).

Quality Education

Although opinions about quality in education are by no means unified, at the level of international debate and action three needs tend to be broadly shared. They can be summarized as: the need for more relevance, for greater equity of access and outcome, and for proper observance of individual rights (UNESCO, 2005:30).

Education authorities wrestle with the question of quality in education while trying to improve accessibility, equality and equity (Niewehuis, 1996:1). Sources of funding and methods of funding allocation have important implications for the outcomes of educational systems (Schiefelbein, 1983:12).

Funding of Public Education

According to the World Bank (1995:53), public finance is the main instrument for implementing public priorities and there is strong rationale for public intervention in the financing of education. The state has a role in promoting equality of opportunity. According to Weber (2002:284), the South African Schools Act provides room for differential fee structures across schools:

- Public schools will be funded equitably by the state,
- Governing bodies could determine the procedures according to which parents who were unable to pay school fees were exempted,
- Governing bodies could charge school fees provided most of the school's parents supported the idea, and
- Parents who were liable for payment of school fees could be prosecuted if they did not do so.

RESEARCH DESIGN AND METHODOLOGY

The term methodology literally refers to the science of methods and it contains the standards and principles employed to guide the choice, structure, process and use of method as directed by the underlying paradigm. It is the way in which people proceed to solve problems (Swanson & Holton 1997:94-3). This paper utilized a qualitative method approach focussing on the following:

Population

We needed information from key informants. In this case, the informants were principals and treasurers. These respondents were chosen because they were likely to be knowledgeable and informative (McMillan & Schumacher, 2001:173) about the phenomena we were investigating.

Sample selection

Rural and peri-urban schools needed to be the focus. The schools were thus chosen from either secondary or primary levels of Quintiles 1-3, i.e. the poorest of the five quintiles designated by the Department of Education. The principals and treasurers of such schools responded to questionnaires, and their experience in their positions was not considered.

Data collection strategies

Data was thus collected through a questionnaire.

Questionnaires

Questionnaires were preferred due to economic reasons, as McMillan and Schumacher (2001:257) show that the use of a questionnaire is economical, it contains standard questions, and questionnaires use uniform procedure thus ensuring comparability of results. Another advantage of questionnaires is that they can ensure anonymity to maintain and ensure confidentiality, thus giving the respondents more confidence in giving accurate information.

DATA ANALYSIS

Quantitative data was analysed using a standard SPSS Version 21 package, thus enabling the results to be widely understood. The following Tables indicate how respondents responded to the questionnaire:

Table 1: Quintiles of schools

QUINTILE	FREQUENCY	PERCENT
1	3	30.0
2	4	40.0
3	3	30.0
Total	10	100.0



Table 1 results, shows which quintiles, 1 to 3, respondents thought their schools had been grouped into. Poor schools in South Africa are grouped into quintiles 1 through 3. All are allocated to quintiles, with the poorest 20% of schools (Quintile 1) receiving 35% of the budgeted funds, the next 20% of schools (Quintile 2) receiving 25% of the budgeted funds, the next 20% of schools (Quintile 3) receiving 20% of the budgeted funds, the next 20% of schools (Quintile 3) receiving 20% of the budgeted funds, the next (Quintile 4) receiving 15%, and the least poor 20% (Quintile 5) receiving the remaining 5% of the funds (DoE, 1999:1).

Public Funding of Public Schools

Table 2:	Understanding	of the resource	target list
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	FREQUENCY	PERCENT
Yes	11	55.0
No	9	45.0
Total	20	100.0



It is interesting to note from Table 2 that 55% of respondents indicated that they know about and understand the Resource Target List, which is not a very great majority. The Resource Target List ranks all schools in the province from the poorest to the least poor. When deciding how each school should be ranked, there are two factors which are equally important. The first factor takes into account the physical condition of the school, and overcrowding. The physical condition of the school buildings need repair, whether there are facilities such as toilets, running water, electricity and telephones, and overcrowding looks at how many learners are there in each classroom. The second factor is the relative poverty of the school community. How poor is the community that geographically surrounds the school, and how poor is the community that is served by the school?

Table 3: Understanding the application of quintiles

	FREQUENCY	PERCENT
Yes	16	80.0
No	4	20.0
Total	20	100.0



At least Table 3 indicates that 80% of respondents do know what a quintile is. The Norms and Standards policy suggests that the rank order list of schools be divided into five groups, called 'quintiles' (Mabidi, personal communication 2006), as described above.



Table 4 indicates that only 60% of respondents know the criteria which are used to determine funding for their schools, which seems quite a low majority. Due to the fact

that a Snap Survey is conducted yearly, principals and treasurers should know that annual survey determines funding and that the number of learners in the schools is the main determining factor in allocating funding.

FREQUENCY	PERCENT
12	60.0
8	40.0
20	100.0
	8



Table 5: Knowledge about the poverty level of the school community

From Table 5, it appears that 60% of respondents know about the poverty level of their school community, although it seems strange that as many as 40% do not know about the poverty level of their school community. The poverty level of the school community refers to the condition of the households around the school and considers whether houses are built in face brick or mud brick, and whether the community has running water and electricity (DoE, 1999:3).

Table 6: Whether school submits an annual budget to the Provincial Departmentof Education

	FREQUENCY	PERCENT
Yes	20	100.0
No	0	0.0
Total	20	100.0



It is not surprising to find that 100% of respondents submit an annual budget to the Department of Education. All schools are supposed to submit one, and if they do not, it is likely that they may not receive their annual allocation according to the scripts of the Education Department (LP, 2011).

Table 7: Whether the school annually submits audited statements to the ProvincialDepartment of Education

	FREQUENCY	PERCENT
Yes	20	100.0
No	0	0.0
Total	20	100.0



Again in this regard, Table 7 shows that 100% of respondents indicated that they submit an annual budget to the Department of Education, as per policy. In terms of

this, schools are supposed to appoint independent auditors who audit their annual income and expenditure. Schools are also required to complete a self-assessment questionnaire and submit it together with the Audited Financial Statement and Compliance Certificate (LP, 2011).

Yes	FREQUENCY 20	PERCENT 100.0
No	0	0.0
Total	20	100.0

Table 8: Whether the number of learners is considered when funds are allocated to the school



Table 8 indicates that all of the respondents believed that the number of learners is considered when funds are allocated to their schools. The Resource Target List is no longer considered when funds are allocated to schools and only the number of learners per school is considered.

	FREQUENCY	PERCENT
Yes	17	85.0
No	3	15.0
Total	20	100.0



The results reflected in Table 9 are not surprising as the Department of Education prescribes what schools should do with the funds, although it could be wondered why 15% of respondents do not seem to know this, or are not told by the Department how their funds should be used. All public schools which have been declared 'No Fee Schools' should not charge mandatory school fees, as defined in SASA as amended. The minimum standard requirement for all No Fee Schools should entail the following (LP, 2011):

- 60% of the total allocation must be spent on curriculum needs, supplementary Learning Teacher Support Material (LTSM) to address the curriculum needs e.g. teaching aids, education toys, charts, science kit
- Schools be permitted to use funds for local sporting activities/ equipment but should not exceed 10% of total allocation,
- Schools have to prioritise allocations to pay for the running of the school i.e. all operational expenses e.g. leasing of copiers, water and electricity, telephone, proper security fencing, provision of clean water or borehole, repair of all broken windows and doors, electrical and gas fittings, filling cracks and painting and other repairs, annual servicing of fire equipment, eradication of termites and other pests every 3 years, quarterly cleaning, weeding and maintenance of gutters, channels and other storm water drains to prevent flood damage to foundations and other facilities,
- Annual repairs and maintenance of roofs to prepare for the rainy season, treating roof trusses and replacement of gutters, annual maintenance of ablution blocks including the speeding up of digestion in toilets and emptying toilets, annual painting and treatment of outdoor equipment to prevent rust damage to metal works,

Schools could be allowed to erect ablution facilities, provided approval is granted, the school allocation may not be used to cover cost of personnel and new buildings e.g. new classrooms or admin blocks, extra-mural curriculum and choice of subject options in terms of Provincial Curriculum Policy, travel claims to be minimized and payments should be as per the SGB approved rates. Transport budget should not exceed 5% of the total allocations with no option of virement (budget

shifting), and travel claim forms for principals must be authenticated by the Circuit Manager and SGB chairperson before payment can be effected.

	FREQUENCY	PERCENT
Yes	6	30.0
No	14	70.0
Total	20	100.0

Table 10: Supplementary funding from other sources



In this regard Table 10 indicates that about 30% of respondents considered that they do have other sources of funding. Section 39 of SASA (imposes a responsibility on all public school governing bodies to do their utmost to improve the quality of education in their schools by raising additional resources to supplement those which the state provides from public funds. It may be difficult for parents to get funding elsewhere as most of them are illiterate.

Table 11: The payment or non-payment of school fees

	FREQUENCY	PERCENT
Yes	1	5.0
No	19	95.0
Total	20	100.0



Table 11 shows only 5% of respondents indicating that parents pay school fees for their children, whereas the rest indicated that parents do not pay school fees. Every school in the country should try to supplement government funding. There is no limit to the amount of school fees which parents can agree to pay (Pampallis, 2002:107). In terms of SASA (South Africa, 1996c:Section 36 (1) a governing body of a public school must take all reasonable measures within its means to supplement the resources supplied by the state in order to improve the quality of education provided by the school to all learners of the school. In fulfilling their obligation to raise supplementary resources, governing bodies are not required to charge school fees. Whether or not to charge school fees is a matter for the parents of the school. SASA links the question of fees to the budget of the school, which the governing body must present to a general meeting of parents for approval. The intention is that the governing body will give the parents all necessary information about the school's income, from the state and other sources, and its educational needs. Parents will then decide what additional revenue the school needs for educational purposes, and how that revenue is to be raised, including whether or not fees are to be charged.

Table 12: The	availabilitv o	f activities	to raise	funds	for the school

	FREQUENCY	PERCENT
Yes	14	70.0
No	6	30.0
Total	20	100.0



Table 12 indicates that 70% of respondents engage in activities to raise funds for their schools. In terms of SASA (South Africa 1996c:Section 36 (1), a governing body of a public school must take all reasonable measures within its means to supplement the resources supplied by the state in order to improve the quality of education provided by the school to all learners of the school.

CONCLUSION

The implementation of the Norms and Standards policy for school funding still needs attention, as far as the principals are concerned. The challenges are clear from the responses provided in the interviews. It is clear that it South Africa is not yet at the stage in which she can provide quality education for its citizen. Norms and Standards for School Funding Policy was the way in which government wanted to redress the imbalances of the past, unfortunately the dream of redressing the imbalances of the past is not yet realized.

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