

**ADVANCING QUALITY EDUCATION THROUGH THE NATIONAL SCHOOL FUNDING
MODEL IN A RURAL SOUTH AFRICAN CONTEXT**

by

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DECLARATION

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I, JOHANNES MOTONA, declare that **ADVANCING QUALITY EDUCATION THROUGH THE NATIONAL SCHOOL FUNDING MODEL IN A RURAL SOUTH AFRICAN CONTEXT** is my own work and that all the sources that I have used or quoted have been indicated and acknowledged by means of complete references.

A handwritten signature in black ink, consisting of a series of loops and a long horizontal stroke extending to the right.

SIGNATURE

29 JUNE 2022

DATE

DEDICATION

This thesis is dedicated to my ever-motivating, courageous, prayerful and loving wife (Kwena Sina Motona). She endured my absence, tensions and pressures with tolerance, open mind, leniency and patience for the success of this study. Also, my lovely and stunning two daughters (Nthabiseng and Lebogang), my handsome son (Mogau) and ambitious son-in-law (Athenkosi Nzala) for the inspiration and endless support they gave me throughout this study. You deserve the honour and blessings. May the good Lord continue to bless you abundantly with the desires of your hearts so that everything you touch turns to gold (*blessings*). Let it rain on you, my beloved (*Pula ga e le nele baratiwa baka*).

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ABSTRACT

Through the national school funding model, South Africa faces its greatest challenge in advancing quality education in rural schools. Many years into democracy, rural schools do not show significant improvements as they struggle to meet their needs. It is evident from the National Norms and Standards for School Funding (NNSF) policy that education funding in South Africa is geared towards equity and redress rather than quality education. As a result, previously advantaged schools in urban areas are moving towards quality education while those in poor and previously disadvantaged rural communities are falling behind. This study examined how quality education can be advanced in rural South Africa through the national funding model. A qualitative research approach was followed to collect data through interviews, observation and document analysis. The study attributes these challenges to the role of government in ensuring that funding is allocated according to the needs of the schools. The qualitative case study method was used for this study. The sample for this study comprised six school principals, six SGB finance committees, one Circuit Deputy Manager: Governance, one District Chief Education Specialist: Governance and one Provincial Deputy Chief Education Specialist responsible for school funding allocations. Three qualitative data collection instruments, namely a semi-structured interview schedule, an observation schedule and document analysis, were used in this study. Thematic analysis was used to analyse data collected through the three instruments.

The results revealed the challenges schools in rural communities face in implementing the national funding model to ensure quality education. The study found that there is still an unintended connection between what the government expects schools in rural communities to do and what these schools are practically able to do through state-allocated funding. The study calls for the national school funding model to be reviewed by considering specific needs and contexts. The revised model will assist, as adequate funding leads to quality education.

KEYWORDS: quality education, national school funding model, finance committee, school governance, no-fee schools, financial management, state-allocated funding

OPSOMMING

Sy grootste vraagstuk, naamlik die swak gehalte van onderrig by landelike skole weens die nasionale skoolbefondsingmodel, staar Suid-Afrika in die gesig. Na etlike dekades van 'n demokratiese bestel sukkel landelike skole steeds om die mas op te kom. Dit blyk uit die beleid van die Nasionale Norme en Standaarde vir Skoolbefondsing (NNSSB) dat die befondsing van skole eerder op gelykheid en regstelling as goeie onderwys gemik is. Gevolglik verbeter die gehalte van onderwys by voorheen benadeelde skole in stedelike gebiede, terwyl dit by voorheen benadeelde skole in landelike gebiede verder verswak. In hierdie studie is ondersoek ingestel na hoe die gehalte van onderwys in landelike gebiede met die nasionale befondsingmodel verbeter kan word. 'n Kwalitatiewe benadering is gevolg om data deur onderhoude, waarneming en dokumentontleding in te samel. In hierdie studie word swak onderwys toegeskryf aan die staat se onvermoë om fondse volgens elke skool se behoeftes toe te ken. 'n Kwalitatiewe gevallestudie is onderneem. Die steekproef in hierdie studie het bestaan uit ses skoolhoofde; ses geldsakekomitees van ses skoolbeheerliggame; een adjunkringbestuurder: regering; een distrikshoofonderwyskenner: regering; en een provinsiale adjunkhoofonderwyskenner belas met die toewysing van skoolbefondsing. Kwalitatiewe data is volgens drie metodes ingesamel, naamlik halfgestruktureerde onderhoude, waarneming en dokumentontleding. Die data wat aldus ingesamel is, is tematies ontleed.

Die struikelblokke wat verhinder dat landelike skole die nasionale befondsingmodel uitvoer om onderwys te verbeter, het uit die resultate geblyk. Daar is bevind dat 'n onbedoelde verband bestaan tussen wat die staat van skole in landelike gemeenskappe verwag en waartoe hierdie skole met staatsbefondsing in staat is. In hierdie studie word 'n beroep gedoen dat die skoolbefondsingmodel hersien word met inagneming van skole se spesifieke behoeftes en kontekste. 'n Hersiene befondsingmodel sal nuttig wees aangesien voldoende befondsing tot gehalteonderwys lei.

SLEUTELWOORDE: gehalteonderwys, nasionale skoolbefondsingsmodel, geldsakekomitee, skoolbestuur, geenskoolgeldskole, finansiële bestuur, befondsing wat die staat toewys

KAKARETŠO

Ka mmotlolo wa bosetšhaba wa thušo ya dikolo ya ditšhelete, Afrika Borwa e lebane le tlhohlo ya yona ye kgolo go tšwetša pele thuto ya boleng dikolong tša dinagamagaeng. Mengwaga ye mentši ka gare ga temokrasi, dikolo tša dinagamagaeng ga di bontšhe dikaonafatšo tše kgolo ge di katana le go fihlelela dinyakwa tša tšona. Go a bonagala go tšwa pholising ya Ditlwaelo le Maemo a Bosetšhaba a Thušo ya Ditšhelete ya Dikolo (NNSSF) gore thušo ya ditšhelete ya thuto ka Afrika Borwa e lebane le tekatekano le tokišo go e na le thuto ya boleng. Bjalo, dikolo tšeo di bego di hlokomelwa gabotse peleng ka dinagasetoropong di sekamela go thuto ya boleng mola tšeo di le lego ka dinagamagaeng tša go ba le bohloki le tšeo di bego di sa hlokomelwe gabotse peleng di šalela morago. Dinyakišišo tše di sekasekile ka fao thuto ya boleng e ka tšwetšwago pele ka dinagamagaeng tša Afrika Borwa ka mmotlolo wa bosetšhaba wa thušo ya ditšhelete. Mokgwa wa dinyakišišo tša khwalithethifi o latetšwe go kgoboketša datha ka dipoledišano, go lebelela, le tshekatsheko ya ditokomane. Dinyakišišo di amantšha ditlhohlo tše le mošomo wa mmušo go kgonthiša gore thušo ya ditšhelete e fiwa go ya ka dinyakwa tša dikolo. Mokgwa wa dinyakišišo wa khwalithethifi o šomišitšwe mo dinyakišišong tše. Sampole ya dinyakišišo tše e be e akaretša dihlogo tša dikolo tše tshela, dikomiti tše tshela tša ditšhelete tša SGB, Motlatšamolaodi o tee wa Sedikothuto: Taolo, Setsebisegolo sa Thuto se tee sa Selete: Taolo le Motlatšasetsebisegolo sa Thuto se tee sa Profense seo se nago le maikarabelo a dikabo tša ditšhelete tša dikolo. Didirišwa tše tharo tša kgoboketšo ya datha ya boleng, e lego lenaneo la poledišano la dipotšišo tšeo di sego tša beakanywa (semi-structured), lenaneo la tebelelo le tshekatsheko ya ditokomane, di šomišitšwe mo nyakišišong ye. Tshekatsheko ya morero e šomišitšwe go sekaseka datha yeo e kgobokeditšwego ka didirišwa tše tharo.

Dipoelo di utullotše ditlhohlo tšeo dikolo tša dinagamagaeng di lebanego le tšona ge di phethagatša mmotlolo wa bosetšhaba wa thušo ya ditšhelete go kgonthiša thuto ya boleng. Dinyakišišo di hweditše gore go sa na le kgokagano yeo e sego ya maikemišetšo gare ga seo mmušo o lebeletšego gore dikolo tša dinagamagaeng di se dire le seo dikolo tše di tlogago di kgona go se dira ka thušo ya ditšhelete ya go tšwa mmušong. Dinyakišišo di dira boipiletšo bja gore mmotlolo wa bosetšhaba wa thušo ya dikolo ya ditšhelete o lekolwe gape ka go ela hloko maemo le dinyakwa tše di itšego. Mmotlolo wo o fetotšwego o tla thuša, ka ge thušo ya ditšhelete ye e lekanego e iša go thuto ya boleng.

MANTŠU A BOHLOKWA: thuto ya boleng, mmotlolo wa bosetšhaba wa ditšhelete tša dikolo, komiti ya ditšhelete, taolo ya sekolo, dikolo tšeo di sa lefelwego, taolo ya ditšhelete, thušo ya ditšhelete ya go tšwa mmušong

LIST OF ABBREVIATIONS

AAFS	Annual Audited Financial Statements
ABET	Adult Basic Education and Training
ADA	Average Daily Attendance
ADEA	Association for the Development Programme
AGM	Annual General Meeting
ANAR	A Nation at Risk
ARRA	American Recovery and Reinvestment Act
BEAM	Basic Education Assistance Module
BEEI	Basic Education Employment Intervention
CES	Chief Education Specialist
CYCW	Child and Youth Care Workers
CPI	Consumer Price Index
CSPM	Civil Society Participation Model
DBE	Department of Basic Education
DCES	Deputy Chief Education Specialist
DHET	Department of Higher Education and Training
EA	Education Assistant
ECD	Early Childhood Development
ESAP	Economic Structural Adjustment Programme
ESD	Education for Sustainable Development
ESEA	Elementary and Secondary Education Act
ESSA	Every Student Succeeds Act
FET	Further Education and Training
FINCOM	Finance Committee
FRN	Federal Republic of Nigeria
FSM	Free School Meals
GBP	British Pound Sterling

GDP	Gross Domestic Product
GSA	General School Assistant
GZSR	Government of Zimbabwe's School Regulations
HEI	Higher Education Institution
HoD	Head of Department
IASA	Improving America's Schools Act
ICT	Information and Communication Technology
IMF	International Monetary Fund
LAs	Local Authorities
LCFF	Local Control Funding Formula
LTSM	Learning and Teaching Support Materials
LDoE	Limpopo Department of Education
MDG	Millennium Development Goal
MEC	Member of the Executive Council
MoPSE	Ministry of Primary and Secondary Education
MST	Mathematics, Science and Technology
NAEP	National Assessment of Education Progress
NAHT	National Association of Head Teachers
NCES	National Centre for Education Statistics
NCLB	No Child Left Behind
NDP	National Development Plan
NEPA	National Education Policy Act
NFE	Non-Formal Education
NFF	National Funding Formula
NGOs	Non-Governmental Organisations
NNSSF	National Norms and Standards for School Funding
NSNP	National Schools Nutrition Programme
PEDs	Provincial Education Departments
P.P.	Pupil Premium
PTA	Parents Teachers Association

PYEI	Presidential Youth Employment Initiative
RDP	Reconstruction and Development Programme
RSA	Republic of South Africa
RTTT	Race to the top
SASA	South African Schools Act
SBB	Student-Based Budgeting
SDG	Sustainable Development Goals
SEAs	Sport and Enrichment Assistants
SGB	School Governing Body
SMT	School Management Team
SUBEBs	State Universal Basic Education Boards
UBE	Universal Basic Education
UBEC	Universal Basic Education Commission
U.K.	United Kingdom
U.N.	United Nations
UPE	Universal Primary Education
USA	United States of America
WASCE	West Africa School Certificate Examinations

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CHAPTER ONE

INTRODUCTION AND OVERVIEW OF THE STUDY

1.1 INTRODUCTION

Quality education is one of the goals set in the 2030 Agenda for Sustainable Development (United Nations, 2018). Encapsulated in this goal is promoting the values of inclusivity, justice, and respect for human rights. It seeks to build transparent, effective, and accountable institutions. For this to happen, a conducive environment should be created for children to realise their rights fully (United Nations, 2018). As a fundamental component of quality education, Education for Sustainable Development (ESD) strives to ensure that all educational institutions, from early childhood development to the tertiary level, take responsibility for sustainable development and sustainability competencies (UNESCO, 2017). In light of today's challenges, ESD is essential, as it targets teaching, learning and the learning context.

South Africa has its own development plan, called the National Development Plan (NDP). This Plan resonates well with the Sustainable Development Goals (SDGs). The Plan seeks to respond to the sustainable and inclusive development challenge (National Planning Commission, 2011). Even though the idea behind SDG 4 is to ensure that education, training and innovation respond to a country's social and economic needs, South Africa lags in its quest to eradicate poverty and reduce inequality and unemployment by growing the economy (Statistics South Africa, 2017). Despite the country's efforts to align the NDP with the SDGs, by ensuring that quality education is delivered, quality education seems to be more evident in urban settings than rural settings (Casazza & Chulu, 2016).

Quality education is the foundation for a successful life in an ever-changing world, and improving the quality of education is an important priority for human development. Didham and Ofei-Manu (2015) argue that education is the longest-lasting investment contributing to poverty reduction and economic growth. However, quality education remains a challenge for many disadvantaged children. Teacher competency, curriculum delivery

and limited resources are some challenges, and many children complete school without the necessary foundational skills. On the other hand, governments have the statutory responsibility to finance education through public expenditure to address barriers to quality education. The EFA Global Monitoring Report (2015) states that significant investments are still needed in developing countries to reduce inequalities and improve the education systems; adequate funding for education in these countries is critical for reducing inequalities.

1.2 BACKGROUND OF THE STUDY

According to the Constitution of the Republic of South Africa (RSA, 1996a), the government is responsible for funding education to ensure learners' rights to education are realised. In response to this constitutional imperative, the NNSSF policy was developed to address equity in school funding (Department of Education, 1998). The NNSSF policy has created space for poor schools to receive more funding than affluent schools. It also strives to narrow the gap between rich and poor school communities gradually. However, the NNSSF policy focuses more on equity and redress than quality education. Many children, particularly those from disadvantaged areas, such as rural areas, now have access to schools and free learning materials.

Furthermore, these children's parents are exempted from paying school fees. Despite its noble goal of reducing inequality by enhancing access to schooling for children from low-income families, the introduction of the NNSSF policy has led to an unintended disconnection between what the government expects schools to do and what schools are practically able to do. While the government intended to address inequalities and Social Justice through the NNSSF policy, most rural schools cannot achieve good quality education due to inadequate resources (Mestry & Ndhlovu, 2014).

The Department of Basic Education (DBE) needs to develop new budgeting systems for funding schools that will advance quality education. The DBE entrusts the Provincial Education Departments (PEDs) with the responsibility of funding schools. The PEDs must determine their expenditures according to the different needs of schools in their

respective provinces, to protect all the learners' right to education and to increasingly make resources available in line with the provisions of the Constitution and the South African Schools Act (SASA) (RSA, 1996a; 1996b). However, the school funding provision is usually less than the schools need. Consequently, government spending targets poor schools to achieve equity and quality education. SASA legally mandates public School Governing Bodies (SGBs) to improve the quality of education through government funding and fundraising measures (RSA, 1996b). The purpose of raising additional funds is to augment the government's monies from public funds.

1.3 RATIONALE FOR THE STUDY

As a school principal working with an SGB, the present researcher has realised that a school needs adequate funding to function effectively, provide quality education to its learners and serve the community satisfactorily. Funding is even more critical in poorly serviced contexts such as rural communities, where poverty and unemployment are common problems. Although the DBE seeks to reduce the impact of these problems on the delivery of quality education through the NNSSF policy (RSA, 2006), rural schools still struggle to satisfy their needs amid rising costs. These costs include costs for teacher professional development, infrastructure maintenance and renovations, as well as security, curriculum development and innovation. The preceding discussion suggests that funding allocated to schools through the NNSSF policy does not match the schools' needs in these contexts.

Several studies, such as Kharisma and Pirmana (2013), and Baker, Farrie and Sciarra (2016), highlight the importance of government funding for quality education, emphasising the role of government in creating equal opportunities to access quality education, by ensuring that funding is allocated per the schools' needs. This suggests that without adequate funding, the provision of quality education to schools will remain an illusion for poor school communities. As Baker (2012) argues, money matters in delivering quality education, implying that schools without adequate funding will not achieve the universal goal of quality education for all. The existing mismatch between the provision of funding for quality education and the schools' inability to provide quality education because of

inadequate funding requires further investigation. This is why this study sought to examine how quality education could be advanced in the rural South African school context through the national school funding model.

1.4 PRELIMINARY LITERATURE REVIEW

Education is a lasting investment that requires appropriate funding. The most critical returns on investments in education accumulate over many years and show results when a child completes their education and contributes to society. Therefore, financing education is the duty of national governments. The literature review intends to examine advancing quality education through national school funding by looking at international and South African policies and practices. Therefore, the literature review in the current study focuses on funding for quality education in three developed countries: the United States of America (USA), Australia and England. The USA was selected because it consists of many states, each with its education funding model designed to identify differences in learners' needs across the districts and financial capacity gaps to meet those needs (Martin et al., 2018). Australia was chosen because it applies various funding models, dependent on different regions, to achieve its educational goals (McMorrow & Connors, 2011).

Furthermore, these funding models guarantee that every child, irrespective of their circumstances, receive the assistance required to acquire quality education (Kerri, 2014). Finally, England was chosen because its education funding is ranked the second critical public service in the United Kingdom (U.K.). Various types of schools in that country are offered different funding levels, which result in educational improvements, as the changes primarily target highly disadvantaged schools (Sibieta, 2015). In the developing countries, the literature review focuses on three countries: namely, Nigeria, Zimbabwe and South Africa. Nigeria was selected because it views education as an instrument for national development, and the Nigerian government strives to exceed the 26% UNESCO recommendation on education funding for developing countries (Oralu & Oladele, 2015). Zimbabwe was chosen because disadvantaged communities do not benefit from education funding. As a result of the economic challenges, education has been

deprioritised in the country's budget. Consequently, many children do not attend school (Changamire, 2017).

In South Africa, before the democratic dispensation, there was unequal public spending on education that promoted racial discrimination. The new democratic government sought to redress these inequalities by improving education in poor communities. Thus, the introduction of the NNSF policy sought to redress past injustices and inequalities between rich and poor school communities. The policy targets schools in poor communities for more funding than schools in wealthy communities. Furthermore, the policy ensures that children from poor school communities have the right to education, guaranteed by the South African Constitution (RSA, 1996a). The theoretical framework and literature review are discussed in more detail in Chapters Two and Three. The theoretical framework underpinning this study is Social Justice.

1.5 STATEMENT OF THE PROBLEM

South Africa faces its greatest challenge in advancing quality education through rural schools' national funding model. Many years into democracy, rural schools show slight improvement as they struggle to meet their needs. These schools are under-resourced and marginalised. Although the new democratic dispensation in South Africa seeks to provide quality education despite the existing differences in economic circumstances, the quality of education in the marginalised areas has not improved as expected (Mestry & Ndlovu, 2014). As a result of their difficult financial situation, rural schools continue to face many education challenges, such as unavailability of educational resources and facilities, such as functional classrooms, well-equipped laboratories and libraries, electricity, security and safety, computer centres with internet connectivity, qualified teachers, and professional development programmes (Modisaotsile, 2012; Roodt, 2018). Education in rural South African schools has been defined as having incompetent teachers, low accountability levels and a lack of support for school principals and teachers. Educational resources and infrastructure also differ significantly, with 30% of schools having no running water and almost 80% having no libraries or computers (Du Plessis & Mestry, 2019).

It is evident from the NNSF policy that education funding in South Africa is geared toward equity and redress rather than quality education. Notwithstanding the South African government's efforts at addressing inequalities in education and the need for Social Justice in providing financial resources for constructing infrastructure for the previously disadvantaged schools, some of these schools have remained dysfunctional and underperforming (Mutekwe, 2020). The result is that -while previously advantaged schools in urban areas are moving towards quality education- those learners in poor and previously disadvantaged rural communities lag. In other words, insufficient funding to provide quality education is challenging for schools in poor and previously disadvantaged communities (Didham & Ofesi-Manu, 2015; Rangongo et al., 2016).

1.6 RESEARCH QUESTIONS

1.6.1 Main research question

The main research question for this study was: How can quality education be advanced through the national funding model in a rural South African context?

1.6.2 Secondary research questions

The following research questions emanate from the main research question:

- 1.6.2.1 How does the implementation of the national funding model advance quality education in rural public schools?
- 1.6.2.2 What challenges do schools in rural communities face in implementing the national funding model to ensure quality education?
- 1.6.2.3 How do rural school principals and School Governing Bodies address challenges emanating from the management of state-allocated funding to ensure quality education?
- 1.6.2.4 How are educational resources used to advance quality education in rural public schools?

1.6.2.5 Which funding model could be adopted to address the challenges encountered in advancing quality education through the national school funding in rural South African schools?

1.7 AIM AND OBJECTIVES OF THE STUDY

1.7.1 Aim of the study

Based on the research problem and research question, this study aimed to examine how quality education can be advanced through the national funding model in a rural South African context.

1.7.2 Objectives of the study

The objectives of this study, emerging from its aim, were:

- 1.7.2.1 To investigate how the implementation of the national funding model advances quality education in rural public schools.
- 1.7.2.2 To identify the challenges faced by schools in rural communities in implementing the national funding model to ensure quality education.
- 1.7.2.3 To investigate how rural school principals and SGBs address the challenges emerging from the management of state-allocated funding to ensure quality education.
- 1.7.2.4 To establish how educational resources are used to advance quality education in rural public schools.
- 1.7.2.5 To develop a funding model to address the challenges encountered in advancing quality education through the national school funding in rural South African schools.

1.8 RESEARCH DESIGN AND METHODOLOGY

Research design and methodology is discussed in more detail in Chapter 4. This section provides a synopsis of the research activities followed. In the current study, qualitative research, through the case study design, was used in line with the research purpose. A case study design investigates a phenomenon in its real-life situation. Creswell (2014) defines a case study as a comprehensive investigation of specific structures constructed on extensive data collection. Yin (2009) defines it as a plan of prearranged questions used to investigate the depth of the phenomenon in its context. The selection of a case study follows the consideration of the study's research question, the research methodology, the researchers' experience, the sample size, the delimitation of the study, time, and funding, as recommended by Wiersma (2004).

In the current study, the target group comprised secondary school principals, SGBs and education officials responsible for school funding allocation in the Capricorn North District of the Limpopo Province. Data collection was done through interviews, observations, and document analysis. Data were analysed thematically. Braun and Clarke (2006) define thematic analysis as a technique for classifying, analysing and writing themes, describing data obtained in a minimal and relevant form.

1.9 LIMITATIONS AND DELIMITATIONS OF THE STUDY

Limitations of the study concern possible weaknesses that are usually beyond the researcher's control and are closely related to the selected research design, funding limits, or other factors (Theofanidis & Fountouki, 2019). Other limitations cited by Theofanidis and Fountouki (2019) are theories underlying assumptions, the study setting, the research design, data collection and analysis, research results and interpretations, and at the end, corresponding conclusions. Limitations are important in research as they must be clearly stated so that the research results are not distorted and misinterpreted by the wider readership. On the other hand, delimitations refer to the features that limit the scope and outline the study's boundaries (Simon & Goes, 2011). Delimitations are, in essence, the boundaries wilfully established by the authors themselves. They are

essential in research as they focus on the definitions that researchers choose to set as the boundaries of their study so that the research aims and objectives are achievable. Fountouki (2019) describe delimitations as primarily concerned with the research objectives, research questions, theoretical underpinnings, variables under study and the research sample.

This study focused on six secondary schools and three Department of Education officials. These secondary schools are public government rural schools located in the Polokwane Municipality of the Limpopo Province. They form part of schools within Capricorn North Education District, Limpopo Province. The schools serve rural communities. The study results are therefore limited to these schools and the departmental officials who participated. The study also dealt with school funding and finances, so the researcher encountered a limiting factor during data collection. Some participants were not comfortable disclosing information related to their school finances. In addition, document analysis was a limiting factor, as it was not easy for some research participants to provide the required financial documents. To gain their trust, the researcher assured them of the confidential nature of the research and that the information would be used for academic purposes only. Other limiting factors included time constraints for data collection and the availability of research participants for scheduled interviews. However, the researcher managed to keep the limitations under control to ensure the quality of the study.

1.10 ORGANISATION OF THE THESIS

The thesis is organised into eight chapters. The following sequence was followed.

Chapter One presents the introduction, background of the study, rationale for the study, preliminary literature review, theoretical framework, problem statement, research questions, research methodology, limitations and delimitations of the study and organisation of the thesis.

Chapter Two focuses on the theoretical framework relevant to this study. It describes how the researcher engaged with the research epistemologically, theoretically,

methodologically and systematically. The theoretical framework underpinning this study is Social Justice.

Chapter Three presents the literature review on various national school funding models and how they advance quality education. A discussion of various studies conducted internationally and locally is presented. The literature review focuses on various studies which investigated education funding models internationally to find out how different countries advance quality education through their national funding models. The exploration of funding for quality education focuses on three developed countries: the United States of America (USA), Australia and England, and three developing countries, namely, Nigeria, Zimbabwe, and South Africa.

Chapter Four comprises the research paradigm, research design, methodologies, sampling, data collection instruments, trustworthiness and credibility, and ethical considerations.

Chapter Five presents data and analyses the research findings of the study, obtained through the data collection instruments, based on the themes and sub-themes of the study, aligned with the research questions.

Chapter Six discusses the research findings concerning the theoretical framework and the literature underpinning this study. The findings are compared to determine whether they support or contradict the theoretical framework or the reviewed literature.

Chapter Seven presents the proposed funding model to advance quality education in South African rural schools.

Chapter Eight provides a reflective summary of the research findings, conclusions drawn from the data, recommendations, limitations and delimitations of this study and identifies areas for future research.

1.11 SUMMARY

This chapter covered the introduction and background to the study, the rationale, problem statement, aims and objective and research questions. It also presented a preliminary literature review, research design and methodology, the study's limitations and delimitations, and the thesis's organisation. The next chapter discusses the Social Justice theory as a theoretical framework underpinning the current study.

CHAPTER TWO

THEORETICAL FRAMEWORK

2.1 INTRODUCTION

The previous chapter provided an overview and background of the study. It also presented the research problem and the research question the study sought to address. As an introductory part of this study, the chapter presented a preliminary literature review and theoretical framework relevant to the current study. The present chapter focuses on the theoretical framework relevant to this study. The theoretical framework outlines the research (Grant & Osanloo, 2014). It describes how the researcher engaged with the research epistemologically, theoretically, methodologically, and systematically. The theoretical framework underpinning the current study is Social Justice. This chapter presents the different views on the relevance of Social Justice and its connection to the present study on funding for quality education. This chapter further considers how Social Justice is conceptualised in funding for quality education. In the present chapter, the Social Justice Theory is discussed against the backdrop of critical aspects. These aspects include a definition of Social Justice, the difference between Social Justice and Distributive Justice, and its proponents and principles. These three issues, as shown in this chapter, connect the Social Justice Theory to quality education, the right to education, and funding, which collectively constitute the focus of this study.

2.2 THE SOCIAL JUSTICE THEORY

Social Justice has been used for ages to advance social reforms. As the definition of Social Justice transformed, it became ever more multifaceted as an idea and in its applications. Today, this concept is inseparably associated with concepts ranging from freedom and equality to policy issues relating to individuals and societal obligations (Reisch, 2002). Originally, the concept of Social Justice was used only to redress past inequalities. Social Justice involves a fair redistribution of resources and opportunities, recognition of societies and freedom to speak and participate in issues that affect their lives (Gale & Densmore 2000; Fraser 2007; Sen 2009). Social Justice is a specific

application of fair principles emanating from the need for social cooperation in search of individual advancement (Harvey, 2009). One of the greatest renowned writers in Social Justice, namely Rawls (1972), advocates the view that Social Justice causes the fair distribution of goods. He emphasises that Social Justice is accomplished when goods, rights and responsibilities are equally spread among people. This suggests that individuals and societies should be afforded opportunities without being discriminated against. In addition, inequalities should be considered in the involvement and achievement linked to social circumstances.

Similarly, resources must suit the needs of individuals and societies. Achieving these requirements is problematic because the cause of unequal distribution is not centred within the distribution itself or entirely on the people who are part of this process; instead, it is centred on the formal and informal norms that administer how members of society treat one another. Thus, continuing changes in distribution will govern how people relate to one another within social institutions.

According to Novelli, Lopes-Cardozo and Smith (2017), societies face inequalities and prioritising measures that promote social cohesion is essential, as they relate to economic circumstances. These scholars assert that education must contribute to developing societies and improving educational policies. This implies that social development cannot be isolated from education. Therefore, education is vital in addressing socio-economic inequalities. Fraser (2005) believes that transformation for Social Justice in education can be better explained if it advances redistribution, recognition, and representation. So, Fraser emphasises the transformative part that education plays in societal transformation. This implies that if just societies are to be achieved, they should involve equal participation wherein people have equal rights and are not discriminated against in the distribution of resources. In education, this implies that it is crucial to ensure that the needs of disadvantaged and marginalised learners are addressed regarding resource allocation, recognition, and active participation in decision-making processes.

The definition of Social Justice in education is broad, as its application depends on various conceptual or theoretical groundings (Griffiths, 2003). Griffiths observes that scholars seem to relate the Social Justice idea with distributive justice notions. The following section shows the differences between the two forms of justice.

2.2.1 Social and Distributive Justice

Scholars positioned in the distributive realm of Social Justice advocate for equal distribution. This is because once such distribution is attained, people's rights are entirely fulfilled (Young, 1990). Distributive justice ensures that learners' equal access to resources is guaranteed and gives everyone equal rights and opportunities, whilst Social Justice refers to changing the circumstances which caused inequalities (Young, 1990). This form of justice prescribes some objectives to ensure learners access the same resources. In contrast, Social Justice cannot be distributed or owned but is characterised by power as it establishes relationships. Social justice often involves social relations, which create power structures (Young, 1990). Therefore, if resources are distributed inappropriately, it will limit Social Justice because it will disregard social relations and promote injustices such as exclusion, marginalisation and inequalities. Social Justice in education implies that the existing education gaps that place limits on other people must be eradicated.

Consequently, education authorities should ensure that every child receives equal education without being discriminated against because of differences such as race and circumstances in which they find themselves. Distributive justice involves the egalitarian principles which promote equal allocation of resources to everyone (Foucault, 2000; Huckaby, 2008). Social justice eradicates institutionalised oppression and focuses on social circumstances (Foucault, 2000; Huckaby, 2008). The differences between the two forms of justice suggest the need to expand our understanding of Social Justice to include the socio-economic conditions of those who seek this form of justice, somewhat limiting it to resource allocation

Social Justice has a direct bearing on education funding. Enslin (2006) has found that inadequate education funding for school learning and teaching support materials and

facilities are evidence of inequalities affecting different ethnic and racial groups. This implies that if Social Justice is to be followed, democracy is to be practised, as it forms the basis for Social Justice. The researcher understands that Social Justice in education is not only about advancing education reforms to promote the present circumstances of power and privileges but also about eradicating inequalities prevalent in schools and their communities. Indeed, Social Justice in education reduces existing inequalities in providing educational resources to schools. The researcher believes that Social Justice aims to eradicate the prevailing disparities between advantaged and disadvantaged school communities. The Social Justice theory, in its two versions, forms the basis for this study since quality education and funding invoke the theory's principles, as explained in the following paragraphs.

2.3 PRINCIPLES OF SOCIAL JUSTICE

The principles of what is right and fair place restrictions on peoples' abilities to advance their own best interests. Rawls (1958) mentions two Social Justice principles: the principle of equal liberty and the difference principle. The principle of equal liberty states that all individuals must be given the highest degree of liberty congruent with equal liberty for all. In contrast, the difference principle states that actions that create inequalities between people are permissible only if they enhance every person's advantage and opportunities and are accessible to all. In the main, Rawls promotes Distributive Justice. The idea of "distributive justice" is also acknowledged by Nozick (1996). However, Nozick provides an alternative approach in his view of justice. Nozick (1996) argues that any distributive state emerging from a just state through transfers will remain just. This has the consequence that one person can be justified in living in luxury whilst another person next to them lives in abject poverty. Nozick (1996) argues for a minimalist state intervention which must deliver maximum opportunities for all.

In pursuance of the line of argument by Rawls, Brighouse (2002) stresses that to attain Social Justice in education, two principles are required: personal autonomy and educational equality. The principle of autonomy shows that each child must be provided with the opportunity to become an independent person. They should be able to reflect on

their own, and teachers are responsible for facilitating the process of helping children become independent. Educational equality is founded on the idea that the state must guarantee liberties so that each child may equal quality education. Equality is about making available additional resources to those with scarce resources, such as the poor, to ensure they receive an outstanding education. Therefore, the equality principle suggests that those with the same ability levels and prepared to put the same effort should face similar treatment, irrespective of their circumstances. Those with lower ability levels should get extra resources than those with more facilities.

2.3.1 Equity, Fairness and Equality

The first aspect of assessing justice includes protecting fundamental human rights and freedoms; the second involves a fair distribution of economic and social accomplishments, which displays an advanced level of social responsibility and a just state (Mishchuk, Samoliuk & Bilan, 2019). Despite the significant changes in the theory of justice in the 1960s, its aspects in their different circumstances, such as equity, fairness, and equality, continue to draw attention within the behavioural economics context and crucial justice needs, which lead to unfair distribution of resources. To explain the three Social Justice principles of equity, fairness and equality, the following table outlines the Social Justice perspectives.

Table 2.1: Perspectives on Social Justice

Author	Social Justice Perspectives
Cook and Hegtvedt (1983)	<ul style="list-style-type: none"> • Relationship between equity and distributive justice as a foundation for social transformation • The incorporation of justice and conflict theories, authority and partnership
Eckhoff (1974)	<ul style="list-style-type: none"> • Distributive fairness principles • Equal opportunities
Leventhal (1980)	<ul style="list-style-type: none"> • Equity involves distributive fairness

	<ul style="list-style-type: none"> • Distributive Fairness means fair distribution, regardless of whether the justice condition is founded on needs, equality, or both
Palma (2011)	<ul style="list-style-type: none"> • Inequality can be assessed through the revenue distribution
Rawls (1971)	<ul style="list-style-type: none"> • Focus on the development of the economically disadvantaged groups
Stiglitz (2000)	<ul style="list-style-type: none"> • Equity improvement usually requires the sacrifice of efficiency
Stiglitz (2012)	<ul style="list-style-type: none"> • The impact of inequality on economic stability

Source: Mishchuk, Samoliuk and Bilan (2019)

Table 2.1 interprets fairness and equality as elements of Social Justice. Democratic principles that have their place in the economic theory are covered in the notion of the state's social obligations concerning distributive justice. This concept is advocated by Rawls (1971), who promotes closing the gaps between the economically advantaged and disadvantaged groups. We can establish the need to consider the Social Justice values, both nationally and internationally, focusing on unfair and less just political guidelines (Peri, 2013). The preceding statement by Peri implies that state authorities must maintain and regulate justice and take intervention measures in cases of transgressions which do not comply with the law, as they compromise social relations, human rights and economic freedoms. This notion is supported by the Universal Declaration of Human Rights, which states that adherence to fundamental human rights as part of Social Justice to be regarded as a minimum level of equity (U.N., 1948). Flowing from the outlined Social Justice perspectives appearing on the table, many researchers omit the subject of injustice boundaries, as they identify conflicting human rights only. Social injustice is not only a social crime but also a powerful, destructive practice that retards economic development. Furthermore, in promoting Social Justice values, the socio-political issues must be interlinked with the socio-economic considerations of different societies.

In this research, equity, fairness, and equality about Social Justice focus on the South African racial group previously disadvantaged and discriminated against because of skin colour, namely the Black group. The three concepts and Social Justice are the principles required to address past prejudices and create equal education opportunities to education for those who have been marginalised based on their race (Jansen, Russo & Beckman, 2006). This implies that South African societies still live under the injustices that previous apartheid administrations created. For this reason, achieving Social Justice is a goal that democratic South Africa strives to attain: eradicate the historical imbalances and abolish discrimination. So, the government must address the past imbalances by removing unfair discrimination practices and providing financial empowerment that creates equal opportunities for everyone. To achieve equity, fairness, and equality, as Social Justice principles, democratic schooling, educational practices and financial support be fair. This implies that Social Justice in education predetermines the provision of quality education.

2.4 RELATIONSHIP BETWEEN SOCIAL JUSTICE AND FUNDING FOR QUALITY EDUCATION

Social Justice is about creating opportunities for institutions such as schools by eliminating discrimination and promoting socio-economic rights. This theory involves equity, fairness, and equality, the most critical democratic values for achieving Social Justice in education (Motala & Pampallis, 2002). Inequalities and inequities between different races characterised the education system under apartheid in South Africa. In 1994, when the democratic dispensation was introduced, the education system needed to be changed to accommodate all races. In South Africa, the three concepts of equity, equality and justice find different expressions in policy (Sayed, 2001). The educational policy discourse applies equity and redress in the Rawlsian justice principle. It suggests that socio-economic benefits should be fairly distributed to empower everyone. This implies that even though all races must benefit, the disadvantaged must benefit the most. Social Justice in education involves rights, fairness, and equal opportunity in improving educational institutions. From a South African policy perspective, equity and redistribution

relate to distributive justice and are aimed at intensifying those who were previously marginalised.

Despite the various efforts to address the problems of inequality and inequity in school funding, the South African education system has not transformed. This is particularly evident in some rural and township schools, where inadequate resources affect the delivery of quality education. This inequity is manifested by poor learner performance compared to former Model C schools. According to the amended NNSF (RSA, 2008), the funding provisions of SASA concerning the government's obligation to redress and equity have benefitted public schools used by wealthy parents rather than needy parents. Since 1994, the South African education authorities have introduced a plan for transforming schools (Karlsson, 2005). For example, the South African Schools Act (Republic of South Africa [RSA], 1996b) delegates the SGBs with governance functions. However, most school principals and SGBs find it challenging to solve their problems in their day-to-day governance functions. This is because they do not have the required governance competencies (Mestry, 2004). Many SGBs in previously advantaged schools, such as former model C schools, perform much better than those in townships and rural schools. Although resource provisioning inequalities have been addressed, as expressed by the government, inequalities still exist. This is due to several factors, including parents' failure to pay school fees, lack of qualified teachers in some schools, and high teacher-learner ratios, particularly in rural and township schools (Motala, 2006).

In this research, Social Justice means just and fair distribution of financial resources to rural schools to achieve quality education, which is in most cases not attained. Thus, SGBs should be capable of handling the funds allocated by the government to their schools (Rangongo, Mohlakwana & Beckmann, 2016) and be developed on accountability and value for money, as prescribed by SASA and the NNSF policy. SGBs wield some power as parents vote for them. However, applying laws such as the SASA remains challenging for many SGBs (Rangongo et al., 2016). This points out that SGBs, especially in disadvantaged schools, do not have the required governance and financial management skills to perform their roles. From the current researcher's perspective, these challenges may be attributed to inadequate training and support once elected, so

they can understand what is expected of them in governing schools. Their incapacity might be worsened by irrelevant and inadequate training they receive, which does not address their diverse school contexts.

Social Justice is also appropriate for the current study as school funding should focus on school needs and the parents' socio-economic background rather than on the poverty index of the community. In addition, many school principals and SGBs in rural schools lack the required governance skills compared to their urban counterparts, who have better skills (Mestry, 2014). Social Justice in rural schools, which tends to be poor, has not been sufficiently researched, compared to urban schools, which tend to be rich. In this regard, Social Justice is instrumental in the impact of school funding on rural schools because they mostly have few resources and have poor education outcomes. In contrast, urban schools continue to produce high-quality education outcomes (Hatch, Buckner & Omoeva, 2017). The following section discusses the three issues linked to the Social Justice Theory in relation to the present study. These issues include quality education, the right to education and funding.

2.4.1 Quality Education and Social Justice

There are several definitions of quality education which relate to goods or services that are used. Therefore, the term quality in education is determined by the services and how they are provided. Diverse as they are, the definitions mainly concern analysing information used to direct decisions about education delivery. According to Hoy, Bayne-Jardine, and Wood (2000), quality in education refers to an assessment of the education process which improves the achievement and development of the clients' talents, reaching the set accountability standards by the clients who spent for the outputs in the education process. In this context, quality education involves making available human and physical resources for teaching (inputs), the teaching quality (process) and the results (outcomes). This further implies that inadequate resources such as teacher allocation and the provision of Learner Teacher Support Materials and infrastructure can negatively affect quality education.

It is important to note that quality education is not mentioned anywhere in the Constitution of South Africa. It is also essential to state that the South African Schools Act does not define quality education. However, it is mentioned four times; specifically, (1) in the introduction, (2) in Section 8(2), (3) in Section 20(1)(a) and (4) in Section 36 (1). The introduction to the Schools Act states, "South Africa needs an education system which will redress historical injustices in education, deliver an education of high quality for every learner and create a solid basis for the advancement of everyone's talents and abilities". Section 8 (2) explains learners' code of conduct, asserting that it must create a well-organised school setting devoted to developing and caring for the quality of education (RSA, 1996b).

The 2005 Report, entitled *The Quality Imperative*, describes the significance of quality education as intended to realise and sustain education development and to safeguard the benefits of educating all learners and the communities (UNESCO, 2004). Undoubtedly, learners and financially disadvantaged communities are least expected to achieve quality education. This is because most of these children are from poor households. As a result, they are deprived of quality education because of the unfair allocation of resources. In addition, they lack the most basic equipment at home or school, such as writing materials and furniture (Smit & Barrett, 2011). Besides resources, educational policies and the processes are challenging, as envisioned to advance Social Justice, as they do not always progress as planned. This points to the fact that if we regard quality education for all as a manifestation of Social Justice, the quality of education will be satisfactory for everyone. However, to achieve quality education, Social Justice is to be achieved. This can be done by redressing past imbalances and closing the economic gaps between the rich and poor school communities.

In this study, quality education relates to the three Social Justice principles and implies that disadvantaged children will likely experience poor academic achievement compared to their financially advantaged counterparts. Unequal education provisioning violates the Social Justice principles, as achieving quality education means closing educational achievement gaps and the needs between the 'haves' and 'have-nots'. This assumption is supported by one of the Education for All goals (UNESCO, 2006), namely, that all

aspects of education need to be improved and excellence guaranteed so all attain that recognised learning outcomes. In addition, the school as an essential organisation has systems, structures and operations associated with teachers and learners. Their goal is to achieve quality education, which leads to enhanced academic achievement (Oghuvbu, 2009). This suggests that, in addressing Social Justice, the government needs to ensure that issues that affect good academic achievement at disadvantaged schools are addressed. These issues include human and physical resources. Human resources include teachers, support staff (administrators, security, maintenance and cleaners), and teacher-learner ratio. Physical resources include classrooms, computer centres, laboratories, libraries, learning and teaching materials and sports facilities.

2.4.2 The Right to Quality Education

The right to quality education is a complex matter. This right will be discussed in the current study, looking at its constitutionality in addressing the Social Justice principles in education, particularly in disadvantaged schools. Such schools often cannot advance the learners' best interests regarding providing quality education. This is because of the persistent inequalities, inequities and unfairness in the education system that affect them. In South Africa, the socio-economic rights of children from disadvantaged schools, such as rural schools, are seriously violated. These children are more affected by poverty as compared to their counterparts in affluent areas. According to Shepherd (2011) and Spaul (2013), underprivileged children are most unlikely to be ready for school and achieve better. This suggests that poverty harms educational opportunities and hinders educational success. Poor schools tend to be dysfunctional, as they will not be financially better positioned to provide quality education for addressing Social Justice principles in their contexts is challenging.

Globally, it is recognised that every child deserves to achieve education as a fundamental human right. This right does not only must be safeguarded but must be completely satisfied to attain the set educational goals. When access, quality and safety are equally given attention, safeguarding is achieved (Marishane, 2017). The right to basic education is realised when every child has access to quality education. Therefore, the government

must protect and promote this right ultimately. In South Africa, the state has passed legislation and policies to achieve its obligation regarding this specified right. However, Marishane (2017) observes that -despite the governments' efforts to make the school environment conducive to teaching and learning- learners still encounter some challenges that negatively affect their rights to education, such as dropouts, grade repetition and poor academic achievement. The problem emanates from the disintegration of, among other factors, access, school safety and quality education.

Regarding international conventions, the right to basic education is a fundamental human right. The conventions, among others, incorporate the Dakar Framework for Action (UNESCO, 2002) and the Jakarta Declaration on the Right to Basic Education (UNESCO, 2005). Guided by several principles, such as inclusion, non-discrimination, equality, accountability, participation, and the rule of law, every child must get a quality education regardless of their background. South Africa, as a member of the international community, has a responsibility to fulfil its obligations in terms of the realisation of the right to basic education for every learner, regardless of their diverse contexts. The right to basic education is entrenched within South Africa's constitution and legislation to achieve this responsibility.

Section 29(1)(a) and Section 28 of the Constitution (RSA, 1996a), in the Bill of Rights, promote and protect the right to education of children, respectively. Furthermore, SASA prevents schools from practising unfair discrimination when registering learners. In the current study, the fulfilment of the right to basic education rests squarely on school principals and SGBs, who are mandated to safeguard the right to education for all learners. The reason for focusing on school principals is that they are expected to play their instructional role in promoting quality education (National Planning Commission, 2013). Regarding the SGBs, as part of their contribution to delivering quality education, they exercise financial control and focus on accomplishing value for money through suitable purchases and providing educational resources (Mestry, 2018).

To achieve its constitutional and legislative obligations for fulfilling the right to basic education, the DBE has established and set up a policy on infrastructure, founded on the

Constitution of South Africa, to make opportunities for all children to receive education in a safe and conducive school atmosphere. These policies comprise the Draft National Policy for the Provision and Management of Learning and Teaching Support Material (LTSM) (DBE, 2014). They were all designed to ensure that every learner receives LTSM of a quality standard. The No-Fee School Policy (RSA, 2006) also focused on relieving underprivileged parents from paying fees and entitling them to state-allocated funding. These policies lessen education challenges and ensure that learners are kept at school to receive quality education.

2.4.3 Social Justice and Funding for Quality Education

Achieving the Social Justice principles, such as equity and equality, is central to school funding reforms in helping to advance quality education. Poor schools and communities are disadvantaged and will take a long time to address past inequities and inequalities, leading to delays in providing quality education. According to Mestry and Bisschoff (2009), poverty targeting assumes that disadvantaged schools need more resources than those that are advantaged financially. The NNSSF policy is an equity tool that intends to distribute considerable recurrent non-personnel expenses to poor schools, assuming that such a measure will improve learning outcomes and advance quality education (RSA, 2006; RSA, 2008). This implies that this policy aims to ensure that previously disadvantaged schools, such as those in rural areas, receive more funding than those in suburbs and towns. This shows a relationship between school funding and poverty regarding educational resources and the socio-economic level of the school's community. Therefore, addressing Social Justice principles for educational transformation requires serious consideration of the context and needs of schools.

Following the demise of apartheid, the transformation of school governance and funding led to the formation of an education system that advanced every child's full potential. All children are to realise the knowledge and skills that will make them take part in the political, social, and economic transformation of South Africa (Sayed, Motala, Carel & Ahmed, 2020). This study critically mirrors school funding, focusing on the following primary research question, which guides the current study: How can quality education be

advanced through the national funding model in a rural South African context? In reviewing funding policies, one can present an argument to emphasise that the policies have failed to address equity, fairness, and equality challenges, as expected, since the dawn of the democratic dispensation in 1994. Based on this review, one can consider an alternative Social Justice redistributive school governance and funding model. To take the argument further, it is essential to reflect on the studies of Fraser (1997, 2009), which refer to the notion of Social Justice as distributive justice and reallocation of resources, which previously benefitted the historically advantaged more, as compared to the historically disadvantaged.

Furthermore, the Social Justice policy seeks to attain the “sameness” of all. It also supports and identifies the marginalised and oppressed societies. In this study, the Social Justice theory concerning funding for quality education relates to the three post-apartheid governance values: namely, *redistribution*, *recognition*, and *representation*. These concepts can be defined in the following way:

- *Redistribution* refers to equity in allocating education resources and opportunities to the marginalised and disadvantaged groups.
- *Recognition* involves respect for diversity in education processes.
- *Representation* refers to the participation of the marginalised and disadvantaged groups in policy formulation and implementation.

Central to the theory is discussing the concept of democracy and citizen involvement in the education policy. In South Africa, this is explained by democratising access to education policy, enshrined in the National Education Policy Act (NEPA) (RSA, 1996c). However, Act complies with the decentralised governance system and the processes established between the state and the provinces. The Constitution vouches for a decentralised state and national control of funds and gives authority for distributing funds to the decentralised provinces, but with a limited oversight role (RSA, 1996a). This refers to the state funds allocated by the national government but does not directly provide education. Therefore, basic education is regarded as a concurrent control in educational

matters. In the present democracy model, the relationship between the state and the provinces is through the 'justification' process (Sayed, 2003). This involves the national Department of Basic Education introducing norms that comply with government legislation. Hence, legislation enables the directing and monitoring of state role-players.

This section summarises the origin of SASA and the related NNSSF. SASA and NNSSF must be read together because of the differences in school funding and resource provisioning. Decentralisation and self-managing schools were discussed, with the view that localised governance through decentralised school funding would achieve equity, fairness and equality. Decentralisation of governance in education forms the basis of governance and funding policies in democratic South Africa. This is articulated in the SASA, passed in 1996 and amended in 2003, and the NNSSF, introduced in 1998 and amended in 2006.

SASA extended significant independence, which involves passing on the status of juristic persons to SGBs. These governing structures were formed in all schools and comprised the principal and elected representatives. Mestry (2012) and Van Dyk and White (2019) caution against establishing two categories of SGBs: SGBs of Section 20 schools and SGBs of Section 2 schools. The SGBs of the Section 20 schools have restricted control over the administration of the school funds and governance functions. The SGBs of the Section 21 schools can apply for added powers and exercise complete control in the administration of the school funds, including employment of teachers, paying for services, and determining extracurricular activities. SASA, in its original and amended form, has created a two-tier SGB structure for the poor schools, with restricted governance control and independence, and affluent schools, with additional governance control and autonomy.

The NNSSF, a policy associated with SASA, enacted in October 1998 and amended in 2006, also required amendments to SASA. It outlines regulations on how provinces should implement funding to schools, prescribing them to use at least 60% of the budget on impoverished schools and exclude parents who cannot afford to pay fees because of their incomes. Central to this policy is the poverty ranking determination of all schools

based on income levels, literacy rates and dependency ratios in the neighbouring community. This relates to the five-tier quintile system. The NNSFF, when it was first introduced, permitted all schools to charge school fees.

The amended NNSFF was introduced to rectify some results of this policy and promote access to schools, categorised as no-fee paying and including Quintile 1 to 2 schools. NSF was amended in 2010 to accommodate Quintile 3 schools as *no-fee schools*, covering almost 60% of all South African schools. Because of the no-fee policy, the Provincial Education Department (PED) gives these schools a more significant amount of money to reimburse for the fees the schools will not receive. Quintile 4 and 5 schools (which charge fees but admit learners who qualify for school fees exemption) are legally responsible for a block grant-based allocation. This allocation is equal to the maximum allocation of the cost of a learner at a no-fee paying school (Department of Basic Education [DBE], Republic of South Africa, 2015). Although no-fee schools are recognised in all provinces, control of the determination of their status is managed at the national level and administered uniformly, considering the three poverty elements: income, unemployment rate and the education level of the community.

Both the amendments of both SASA and NNSFF showed a substantial policy change. The government's policy for all schools to charge fees was not more workable than that enacted in SASA in 1996. For many schools, the idea that the "governing body of a public school must take all reasonable measures within its means to supplement the resources supplied by the state to improve the quality of education provided by the school to all learners at the school" (RSA, 1996b), was no longer possible. The amended NNSFF also specified stringent directions about enabling access to fee-paying schools for learners who cannot pay the fees charged by such schools. Exemptions were to be decided based on a set of norms and conditions.

2.5 SUMMARY

This chapter presented the theoretical framework of the Social Justice Theory. The theory is presented as the background to the literature review and research method on funding for quality education, which constitutes the focus of this study. The researcher also defined Social Justice, explained the differences between social and distributive justice, and discussed the proponents and principles of Social Justice and the three issues linked to the Social Justice Theory in relation to this study; namely, quality education, the right to education and funding of public schools. The next chapter presents the literature review on education funding models from various countries.

CHAPTER THREE

LITERATURE REVIEW ON FUNDING FOR QUALITY EDUCATION

3.1 INTRODUCTION

The previous chapter presented the theoretical framework of the Social Justice Theory regarding quality education, the right to education and the funding of public schools. Guided by the research aim and questions, the present chapter reviews the literature on the funding models applied in various countries. In other words, the chapter draws on examples from the literature on policies and practices relating to how quality education is pursued through various funding models from international countries and South Africa. The present chapter aims to examine what is known about national school funding and identify the gaps that exist in this regard. Through the review of the relevant literature, the researcher sought to gain insight into the national school funding as it applies in different countries. Of significance is how education funding impacts the provision of quality education.

The issue of education funding is a challenge that faces many developed and developing countries. Education is a fundamental societal service that the government must fund adequately. Miller (2001) asserts that education is a vehicle for economic development, and if it must achieve this aim, it should be of a quality standard. It is also worth noting that if education is to be of a high standard, appropriate funding and resource provisioning by the government are required. According to Ross (2002), increasing access, efficiency and quality education require the government to allocate physical and financial resources to schools appropriately. This implies that the government's responsibility should be to monitor the provisioning of quality education on an ongoing basis, to plan how resources will be allocated, and schools will be funded timeously. However, the challenge in many countries is the increasing inequalities in the performance of learners from economically advantaged areas and those from poor areas. This challenge intensifies when there is a shortage of teachers, a lack of teaching and learning material, overcrowded classrooms and a decline in the quality of the learning environment. The current study on funding for

quality education focuses on three developed countries: the United States of America (USA), Australia and England.

3.2 EDUCATION FUNDING MODELS IN DEVELOPED COUNTRIES

Countries need to grow and develop human capital for their citizens. In developed countries, education funding is prioritised in the country's overall fiscus, as quality education has good returns for human and economic development (De Witte et al., 2019). The average spending on primary and secondary education is approximately 3.5% of these countries' Gross Domestic Product (GDP) (OECD, 2016). Thus, choosing a suitable funding model is essential in pursuing a sustainable, progressive quality education. Developed countries, however, are faced with enormous educational challenges. This is partly because funding models differ across these countries (Hanushek & Woessmann, 2017). Therefore, different funding allocations advance different educational goals. The following section reviews the literature on funding models in three developed countries: the USA, Australia and England.

3.2.1 Funding for education in the USA

The USA is one of the world's most highly developed countries. It is also ranked amongst the most developed countries, with a high standard of living. The country comprises 50 states and the District of Columbia, a portion of land separated by the federal government from the nation's capital, Washington, DC. The USA has a federal system of government, in which states have their administration and legislatures (World Book, 1997). This suggests that all the 50 states have their public education systems in terms of authority over the schools, giving rise to unequal education funding from the state to state.

3.2.1.1 *State Education Funding Models*

State education funding models are designed to identify differences in learner needs across districts and financial capacity gaps to meet those needs. Education funding models must safeguard equal access to fundamental education opportunities that enhance quality education. In the USA, the responsibility of education funding lies with

the local, state and federal governments and is characterised by some inequalities (Martin, Boser, Benner & Baffour, 2018). These three spheres of government work in tandem to change the education funding models to promote quality education. State constitutions mandate the states to play a significant role in providing quality education, and local, and state governments provide a significant portion of education funding. The federal government ensures funding goes to the country's poorest schools to address the inequalities they encounter (Martin et al., 2018). While the local government traditionally funded historically public schools in the USA through local property taxes, the funding responsibility has shifted to the states (Kozol, 2005). This implies that the state on its own has a responsibility to provide education. Due to the vast differences in property taxes among the districts in different states, poor districts generate less funding for schools than affluent districts, resulting in gaps in individual learner costs. The model of funding education through taxes is, however, often criticised. For example, Derisma (2013) argues that funding education through property taxes creates uncertainties because state tax revenue is mainly generated from income and sales tax, which are influenced by economic factors. This suggests that funding uncertainties may negatively affect children from impoverished families in poor districts in the USA.

Insufficient funding shows that budgetary pressures drive a country's funding. Addressing these pressures requires the state to approve financial reforms that offer total funding, with an opportunity to achieve quality education. It is vital to ensure that education costs elicit funding that caters for delivering essential resources required to achieve quality education. Research (Baker, Weber, Srikanth, Kim & Atzbi, 2018) assert that adequate funding is required to provide quality education to learners in high-poverty districts. This means that states which provide insufficient funding to poor districts are disadvantaging needy learners and depriving them of the quality education they deserve. An essential element of fair education funding is providing more funding to districts that serve learners from low-income families than those that serve affluent families.

The United States does not have a national public education system. However, under their constitutions, the states must provide systems that cater free public schools for all resident children (Baker et al., 2018). States, not school districts, must implement the

nation's public-school education funding models and support and maintain such funding models. In turn, the states use a formula to fund local school districts, which is endorsed as part of the regulations by the state legislature. The education funding formulas regulate the income that school districts can generate using local property tax and other taxes, as well as the expenses that the state is obliged to pay as taxes from the state. State finances determine the exact funding the state offers to local school districts. As a result, some states cannot offer the revenue amount projected by the state's own funding formula from their budget. This disorder is called "formula underfunding." Cornman, Zhou, Howell and Young (2018) confirm that, on average, state and local revenues account for nearly 92% of the total public education funding. The federal government contributes the remaining 8%, targeting poor learners and learners with disabilities. In various states and poor districts, however, public schools are highly underfunded (Cornman et al., 2018). This suggests that public education funding is fairly distributed in favour of learners from low-income families and communities.

Leachman (2019) indicates that education funding has not yet improved from the significant decreases effected throughout the Great Recession over the past decade, as almost fifty per cent of all states had to return to the inflation-adjusted funding levels that had been implemented before 2008. These funding levels came after extensive teacher protests and strikes, which led to school funding reform as a policy. It also led to budget considerations in many states where there was the refusal by state officials to improve funding formulas and intensify state savings in public-school administration. The refusal resulted in many legal proceedings in ten states disputing ongoing underfunding, resource shortages and poor learner achievement (Leachman, 2019). This shows that the country's education funding must be inflation-related over the years to match the educational demands to achieve the best educational outcomes. In other words, poor funding breeds poor educational outcomes.

3.2.1.2 Student-Based Budgeting Model

The Student-Based Budgeting (SBB) model has become a prevalent initiative for district leaders to provide schools with scarce resources, considering existing achievement challenges and declining federal and state support. The SBB model is variably known as fair student funding, weighted student funding, student-centred funding or student-based allocation. It is a funding model in which allocated funding considers factors such as the registered learners' enrolment and their different needs. It involves English language learners or learners from impoverished circumstances. The SBB model further gives school leaders strict control over their school budgets. Around 2008, few of the country's leading urban school systems used this model. However, in 2017 and 2018, the model was used mainly by sixteen extensive urban school systems (Education Resource Strategies, 2018).

The SBB model aims to increase equity in funding in all schools and allow school principals to prepare school budgets in such a way that it will suit the learners' individual needs. The model also assists in applying a funding formula that allows school leaders flexibility in additional resource utilisation. However, the model does not guarantee that resource utilisation will promote learner achievement. To create an environment conducive to learner success, schools must have a well-defined vision aligned to the SBB model and a clear understanding of the successful implementation of the SBB model (Travers & Catallo, 2015). The overall system strategy involves how districts fund their schools, giving school principals flexibility over using resources to drive change. School leaders can also identify the critical teacher and learner needs, curriculum implementation and reorganisation of resources, such as money, time, people and technology. This implies that the goals of the SBB model are to inform the district's strategic choices and guide leaders on how they should track their success. In implementing the SBB model, the role of the principal is extended to managing resources and setting a school vision. For school principals to succeed in these tasks, districts must give schools substantial support and training. Equally, with the SBB model, the central office's role changes from being traditionally administered to being collaboratively administered and necessitates an

essential change in the roles and attitudes of the officials employed in the central office (Travers & Catallo, 2015).

In the USA, many school districts have adopted the traditional funding model, which is distinct from the SBB model. These districts distribute school resources through personnel and funding allocated for specific purposes. Thus, school principals in traditional funding systems have restricted resource flexibility. Furthermore, there has been little transparency regarding how schools receive funding in many districts. As a result, schools found it hard to measure how the funding system equitably provided resources. The SBB model is intended to advance the three pillars of a well-functioning funding system (Education Resource Strategies, 2018): equity, transparency and flexibility.

Equity: Funding models guarantee equitable distribution of resources based on learner needs.

Transparency: The ideal funding system has clear directives on how, why and where funding is allocated. These directives are outlined in a formula whereby the district central office takes care of the stakeholder inputs.

Flexibility: How funds are distributed allows school leaders to choose the appropriate resources to promote learner achievement. This implies that school principals can control their school budgets.

3.2.1.3 Local Control Funding Formula

The USA still has many states that find it difficult to bring back public education funding to where it was before the Great Recession. This is because recessionary spending decreases (Leachman & Figuera, 2019). Research by Evans, Schwab & Wagner (2019) and Knight (2017) found that poor districts were significantly affected by recessionary budgetary cuts. In California, lawmakers enacted far-reaching finance reforms that augmented inclusive school funding and provided supplementary resources to poor districts. Local Control Funding Formula (LCFF) was passed in the 2013–2014 school years. The LCFF's goals were to increase school funding, deliver better funding to poor districts and make local spending flexible. In other words, the funding system allocated

additional funds and educational resources to poverty-stricken districts to address equity gaps between the financially advantaged and disadvantaged districts.

LCFF characterised considerable reforms to the California school funding system. The reforms targeted extra learning aids for English learners, poor learners and adopted children (Rose & Weston, 2013; Taylor, 2013). In California, Baker, Farrie & Sciarra (2018), and Bruno (2018) studied differences in funding equity using the regression-based or weighted-average method through federal or state statistics. Chingos and Blagg (2017) endorse federal figures to classify every state in funding equity using the weighted average method. While Chingos and Blagg's research is not intended to assess LCFF, it shows that funding progressiveness in California during the 2013 and 2014 years was like the situation in 1994 and 1995. During these years, learners from financially disadvantaged backgrounds went to a district that received about 1% more local and state funding, nearly \$100 per learner more during 2013 and 2014, compared to the financially advantaged learners. The difference increased to 3% when federal funding was considered and translated to nearly \$300 per learner. This implies that -when using different equity measures- policymakers should consider the extent to which such measures result in different decisions about school finance reforms.

Bruno (2018) evaluated change in Californian schools' funding equity, particularly assessing the impact of LCFF. He found that in the four years that led to the enactment of LCFF, the financially disadvantaged learner went to a district that achieved 6.4%, 6.2%, 5.6%, and 3.8% additional overall funding compared to the financially advantaged learner. This implies that school funding equity decreased during the period that led to the enactment of LCFF and dropped during the years 2012 and 2013. Nevertheless, in the four years succeeding the implementation of LCFF, the funding improved to 4.4%, 5.2%, 6.5%, and 7.0%, respectively. Research by Chingos & Blagg (2017) and Bruno (2018) applied diverse approaches to change per-learner measure district funding. Chingos and Blagg (2017) applied fall enrolment from the National Centre for Education Statistics (NCES) information, while Bruno (2018) applied the average daily attendance (ADA). ADA exaggerates per-learner funding tariffs for low attendance districts and has upward school funding equity measures (Baker, 2014b; Knight & Olofson, 2018). In other words,

in addressing funding equity between the rich and the poor learners, the funding system must consider the needs and challenges of the different school contexts.

3.2.1.4 Education funding disparities

Schools require more investments targeted at significantly raising the level of funding for their needs as disparities in funding and learner achievement must be addressed to reduce inequalities and advance the national mandate in advancing quality education. Public education in the United States is mainly criticized for not performing at comparable achievements with other developed countries (Baker, 2016). Unlikely, public education in the U.S. is catered through 51 different education systems administered by 51 states, including the District of Columbia's accountability and governance systems. These different education systems are funded mainly by state and local taxes. In a policy brief, Baker and Weber (2016) point out that many US state education systems, such as Massachusetts and New Jersey, are associated with the highest performing states. The reason is that, on average, in these states, children come from wealthier families, their parents are well educated, and their schools are better funded. In contrast, Baker and Weber (2016) show that Florida is associated with poorly performing states against international standards. The reason is that some US states that have not reported different performance on international assessments performed less well than Florida on the National Assessment of Educational Progress (NAEP).

State funding in elementary and secondary schooling differs vastly, and many poor-performing states have little funding for their schools (Baker, Farrie & Sciarra, 2016). Poor-performing states have the less economic capacity to raise additional revenue for their schools. States with less per capita economies are disadvantaged compared to states with significant economies. For fewer economies to generate similar revenues as more significant economies, they need to levy higher tax rates (Baker, Sciarra & Farrie, 2010). This presents a considerable challenge to poor states that intend to levy tax rates similar to more affluent states as they do not have the economic capacity to afford such higher tax rates. It has been challenging to regulate how much spending is necessary to advance equity of learners' achievements across states. This suggests that children from

poverty-stricken families are affected dramatically across states. These disparities are indistinguishable from inequalities as rich states have well-funded districts and schools whilst poor states have poorly-funded districts and schools. Baker, Taylor and Vedlitz (2008) claim that the U.S. does not apply a standard measure of learner achievement across all public schools, districts, and states. Each state has created its system of determining learner achievements. The current national assessments, such as the National Assessment of Educational Progress (NAEP), do not have adequate coverage of different schools, districts, and student populations amongst all states to allow inter-district and interstate comparisons of learner assessment outcomes (Braun & Qian, 2008). This suggests that standardised assessment measures are needed to create a comprehensive picture of disparities across all districts within states.

3.2.1.5 Teach for America

The parallel education system developed in New York City was owing to several federal and state policies and commissioned reports focused on teacher quality and preparation. Concerns about teacher quality gave rise to policies such as *No Child Left Behind* (2001), which addresses the issue of a highly qualified teacher in every classroom (United States Department of Education, 2001). The current policies that influence education originate from the social movement of the 1960s. President Lyndon B. Johnson's *Great Society* played an important role in education policies (Middleton, 2008) with the *Elementary and Secondary Education Act* (ESEA) of 1965. ESEA intended to address equal and civil rights and fight poverty. ESEA has been revised several times, including *Improving America's Schools Act* of 1994 (IASA), *No Child Left Behind* (NCLB) of (2001), *American Recovery and Reinvestment Act* of 2009 (ARRA), and *Every Student Succeeds Act* of 2015 (ESSA).

Succeeding the end of World War II, Europe experienced reconstruction under the Marshall Plan, and the United States became a superpower. The central economic ideology during this period was by English economist John Maynard Keynes. Keynes promoted that government should play a significant role in the economy. This Keynesian model reinforced a circular flow of money, distributing funds to the marginalized

communities who would put money back into the economy. This model promoted a welfare state that aimed to protect its citizens (Darder, 2015). Hyslop-Margison & Sears (2006) describe the welfare state as a nation where the government is responsible for safeguarding its citizens to receive necessary essential goods and services. A welfare state directs public funds to satisfy the basic needs of its citizens in essential areas such as education, health services and housing. Antipoverty plans and personal and corporate progressive taxation wealth distribution systems are typical features of the welfare state.

This Keynesian model was changed in the late 1970s with the change to free-market ideologies. The change took a further business and managerial background to public institutions. The goal was to eradicate government control and oversight while ensuring accountability and self-regulation (Engel, 2000). Market ideologies are also known as globalization, deregulation, neoliberalism, marketization, and privatization (Edwards & De Matthews, 2014). The free market, supporters of deregulation, solve problems by deregulating teacher hiring and education” (Apple, 2007). With this emphasis on accountability, teachers, researchers and policymakers began looking more closely at teachers' effectiveness and quality (Cochran-Smith & Fries, 2005). This analysis led to the public perception of an imperfect education system with low-quality teachers. Criticism of education and preparation has been a continuing phenomenon. Over the previous 50 years, researchers such as Berliner (2005), Levine (2006) and Fraser (2007) have addressed countless concerns in education.

ESEA (1965) secured federal funding for education initiatives and allowed the government more control over funding distribution to the states. The release of 1983 commissioned report *A Nation at Risk* (ANAR) outlined that the United States was no longer viable while prompting a call to improve education (Ballou et al., 1999). ANAR also stressed principles such as rigorous standards, competition, choice and the need for learners to participate worldwide (National Commission on Excellence in Education, 1983. *No Child Left Behind* (2001) intended to reform education by eradicating the achievement gap, offering a world-class education and designating a highly qualified teacher in every classroom (Office of Elementary and Secondary Education, 2006; United States Department of Education, 2001). NCLB sustained market reform ideologies such

as competition, high-stakes testing, standardization, vouchers and school choice. President Obama's *American Recovery and Reinvestment Act* (2009) presented the *Race to the Top* (RTTT) grant program to accelerate state and local district K-12 education reform. One main emphasis of RTTT is on *Great Teachers and Leaders* (United States Department of Education, 2009), which was intended to improve and reform teacher and principal programs. These national policies maintained different practices to train and prepare teachers and leaders. The discourse within these policies also promoted a more marketized education system.

On 10 December 2015, President Obama reauthorized ESEA as the *Every Student Succeed Act* (ESSA), a bipartisan bill designed to strengthen NCLB. ESSA discards the attention on standardized testing and the one-size-fits-all view of the last 15 years whilst supporting high academic standards, accountability, and state and local control (U.S. Department of Education, 2015). ESSA also involves initiatives to prepare, develop and advance effective teachers in America's schools and develop support for high-performance public charter schools for poor learners (The White House, 2015). ESSA remains a vibrant support base by the government for charter schools.

3.2.2 Australia

Australia applies various funding models, depending on the region. The government uses school funding to attain educational goals and objectives (McMorrow & Connors, 2011). In Australia, the state and territory governments have a constitutional duty over education funding (Department of Parliamentary Services, 2011). Furthermore, the state and territory governments must provide leadership and control in running and funding government schools. Universal education is obligatory in Australia, and the delivery of public education is a way in which the government achieves its obligation to provide universal education (Department of Parliamentary Services, 2011). This means that the state and territory governments are obliged to have regulations that govern the administration and funding of schools.

3.2.2.1 Australian Funding Model

The purpose of any funding model should be to provide schools with flexibility in planning and resource utilisation. Schools need to have greater authority, responsibility and accountability over finances and allocation of resources. In Australian states, territories and the government should fund education (Australian Government, 2019a), and they decide the national education policy through the Council of the Australian Government system. Government schools are mainly funded by the states and territories and, to a lesser extent, by the government. This suggests that the states and territories have an overarching obligation to deliver quality education and funding of schools. In 2018, the government started implementing a *needs-based funding model*, which differs from the former, where the Commonwealth funding varied between states, territories and governments. The needs-based model ensures that disadvantaged learners receive more funding from the Commonwealth (Haythorpe, 2017). This model involves distributing more funds and providing additional educational resources to schools where learners need them most to advance and meet the required quality education outcomes.

Following Section 22A of the Australian Education Act, the government must reach or go beyond its overall funding requirements to qualify to receive the Commonwealth Funding (Australian Government, 2013). Furthermore, states and territories have the option to fund more than their minimum funding requirements. In addition, the bilateral reform agreements that commenced on 1 January 2019 prescribe the minimum state and territory funding requirements until 2023 (Australian Government, 2019a). These funding requirements outline funding stages that the government, states and territories have signed. The bilateral agreements also outline reform measures to advance quality education.

On the other hand, the National School Reform Agreement outlines long-term goals for attaining quality education (Council of Australian Governments, 2018). The two agreements hold the Commonwealth responsible for ongoing school funding based on the Schooling Resource Standard until 2029 (Australian Government, 2019b). The Schooling Resource Standard estimates funding following school needs to meet learners'

educational demands and is founded on the 2011 Gonski Review of Funding for Schooling recommendations (Australian Government, 2011). The Schooling Resource Standard considers individual learners' needs and provides additional funding for poor schools and disadvantaged learners. As states have a constitutional obligation for school funding, the Commonwealth, as the minor funder of government schools, must fund a minimum of 20% of the total Schooling Resource Standard by 2023 (Australian Government, 2019b).

3.2.2.2 Needs-Based Funding Model

Needs-Based Funding is a model that guarantees that every child -irrespective of their conditions- gets the assistance desired to receive a quality education as a public service (Kerri, 2014). This implies that it is essential for the funding model to ensure that educational achievement occurs based on potential rather than economic privilege. All children want to see their individual needs satisfied at school. Therefore, the needs-based funding model is essential for Australian schools. The 'needs-based' funding model is reasonable, fair and efficient, as much funding is distributed to schools with the most learner needs. For example, a public school with many learners from disadvantaged families would receive more funding than a school of the same size with fewer learners from disadvantaged families. Haythorpe (2017) asserts that needs-based funding affords school principals and teachers the resources to design and implement teaching and learning plans that suit the specific needs of learners at their schools. This suggests that school funding and allocation of resources allocation must be based on critical needs. Furthermore, funding should be allocated to the advantage of schools that require it most and be based on the educational resources that are needed, rather than on the schools that do not require it and on optional resources.

Haythorpe (2017) confirms that 9 % of school principals reported that getting additional needs-based funding resulted in a substantial transformation in the delivery of quality education at their schools. School principals and teachers are the primary contributors to quality education provision in public schools. For this reason, they should be provided with adequate resources and support to meet the learners' needs. Positive educational

outcomes start with qualified teachers who have undergone appropriate professional development. Where teachers, staff and school leaders get opportunities to share their knowledge and experience, there is an improvement in learner outcomes (Haythorpe, 2017). A well-resourced school cares, inspires and challenges its learners. In turn, learners get involved in their learning. Haythorpe (2017) asserts that quality education depends on factors such as the appointment of qualified teachers, school principals, specialists and support staff; a learner-centred curriculum, continuous professional development, and effective and efficient learner assessment. It also depends on technical support access and support for learners with additional needs, including those in poverty-stricken areas, rural schools, and communities where learners' first language is other than English. In other words, a school with all the resources it needs encourages teachers and learners to get motivated in providing teaching and learning activities, as learners can meet their needs and targets in terms of achieving quality education outcomes. Therefore, the government must ensure that it provides resources that suit the learners' needs, especially those in financially disadvantaged areas.

3.2.2.3 Student-Centred Strategic Resourcing

In all schools, strategic resourcing is necessary to ensure that available resources are utilised efficiently. Providing and achieving quality education in a student-centred school requires effective use of teaching and learning resources (Robinson, Hohepa & Lloyd, 2009). Furthermore, teachers need resources for continuous professional development to keep abreast with the latest professional knowledge. Whilst Black (2006) states that student-centred education has cost implications, schools that have entrenched student-centred procedures assert that assurance of resource provisioning is meaningful for quality learning. Levin and Fullan (2008) describe strategic resourcing as necessary for the effective enhancement of teaching and learning but point out that money is not more critical than the effective utilisation of existing resources. Research in educational reform shows that growth in financial resources on its own has not had a significant impact on learner achievement. Hanushek (2004) regards reform initiatives that increase funding to existing programmes as similar actions with more strength. Similarly, Caldwell and Harris (2008) view school funding as essential but insufficient to transform school performance,

even in disadvantaged situations. Levin and Fullan (2008) further observe that -although additional funding cannot be the solution- resource strategies can handle substantial change by promoting innovative ways. In Ontario, Levin and Fullan (2008) discovered that several educational organisations have not considered how resources were distributed. Therefore, the advancement of leadership and governance must be focused on assisting leaders in making informed decisions about allocating personnel and other resources to advance quality education.

Strategic use of resources involves allocating and safekeeping resources associated with academic goals and learners' needs, rather than merely accruing funds. However, student-centred learning has cost implications (Black, 2006). Student-centred learning aims mainly at achieving systemic necessities rather than the learners' requirements. Black (2006) asserts that an implementable means for aiding student-centred schools is funding allocation that can be utilised for extra personnel to give teachers the opportunity for professional development and collaboration.

Developing a collective learning community involves availability and commitment by all staff members (Danzig, Osanloo, Blankson & Kiltz, 2005). However, providing time for teachers to advance collaborative structures has high financial costs for schools with limited and restricted budgets (Black, 2006). A lack of funding for teacher collaboration and reflection on their professional practice hinders advancing quality teaching and learning (Black, 2007). This suggests that funding is essential for quality teaching and learning processes. However, teaching and learning-driven schools with a solid, clear, concerted vision establish their strengths to find and carry out the plans that satisfy their learners' needs. Quality education-driven schools concentrate on the knowledge, experiences and existing background of the school and the entire community. Community knowledge assists student-centred schools in recognising and establishing community relations to create learner opportunities (Black 2006; Caldwell & Harris 2008). This implies that schools are community centres, and if they are educationally focused, they must regard education partnership as an integral part of their success in advancing quality education.

3.2.2.4 Rural Education

The staffing of rural, remote, and isolated schools remains a concern in Australian education. Whilst there has been much attention to rural staffing schools, the issue remains contemporary and the accompanying challenges perpetual. Roberts (2004) and Sharplin (2002) identify perpetual challenges facing rural schools. Both take note of the extensive history of research and government reports, explaining the challenges of high staff turnover, younger and new staff, inexperienced leadership, and teachers offering subjects outside their specialization and expertise. Even though Roberts (2004) focuses on teachers' experiences in schools and policymakers, and Sharplin (2002) focuses on pre-service teachers' perceptions, they show similar themes about rural education. Pre-service teachers and teachers identify professional challenges such as isolation, lack of access to professional development, teaching outside their expertise, and teaching multi-age classes, along with personal challenges such as social isolation, fitting in with their new community, and a lack of privacy. Additionally to these challenges, Roberts (2004) further outlines teacher recruitment and retention issues, including the role of teacher background, incentives, the staffing system, leadership, attracting indigenous teachers, and induction and mentoring. In contrast, Sharplin (2002) identifies those pre-service teachers develop their views about rural teaching from idyllic or hellish images of rural life, which influences the recruitment and retention of rural teachers.

The two reports show possible strategies that give attention to staffing problems. One critical factor they concentrate on is the lack of availability of information to pre-service teachers about rural teaching. They argue that it is important to focus on pre-service teacher training to prepare teachers to teach at rural schools. This involves exposing potential teachers to rural communities and preparing them to work in rural communities. Roberts (2004) maintains that it is essential to develop a model of rural staffing that focuses on professional matters that enhance teaching conditions and staffing support. This includes support for teachers working in rural communities, monetary reimbursements to address the high living costs in rural settings, and ways to address the social isolation teachers face. These strategies intend to offer teachers an enjoyable work environment and develop the skills teachers want to work in rural communities. If these

occur, teachers will be willing to work and live in rural communities. It becomes evident that numerous studies reviewed, and subsequently, the themes mirrored those identified by Sharplin (2002) and Roberts (2004).

3.2.3 England

Education funding is the second most important public service in the United Kingdom (UK). It had a budget of around £90 billion in 2017 and 2018, translating into approximately 4.3% of the national revenue (Belfield, Farquharson & Sibieta, 2018). UK education funding has rapidly increased from the late 1990s until the late 2000s. During this period, the real-terms increase has been at an average of 5% annually between 1998 and 1999 and 2010 and 2011. Belfield et al. (2018) observe that education funding has decreased in real terms due to funding cuts since 2010. Between 2010 and 2011 and 2017 and 2018, funding decreased by 14%, taking it back to 2005 and 2006 and the same share of national revenue experienced through the 1990s. Such trends in overall education funding indicate what has transpired in various areas of education funding. These funding cuts put financial pressure on educational spending in England, as educational outcomes and human capital development are the most significant drivers of economic growth and contribute to human well-being. The primary factor contributing to school funding is the enrolment of learners across different areas. During the 1990s, learner enrolment increased before decreasing during the 2000s. From 2010, it increased again, with numbers in primary schools increasing by 11% between 2010 and 2017. Secondary school enrollment was constant until 2016 but is predicted to increase by 16% between 2016 and 2026 (Belfield et al., 2018).

3.2.3.1 School Funding Distribution

In England, school funding per learner increased significantly between 1999-2013. It also became more diverse across schools with higher funding levels, targeting more disadvantaged schools. Funding increases per learner were considerably higher for many disadvantaged primary and secondary schools, 83% and 93%, respectively, compared to the smallest number of disadvantaged primary and secondary schools, which were at

56% and 59% (Sibieta, 2015). Some of these funding increases per learner led to a more excellent teacher-learner ratio and high cost per teacher, which were approximately 20-30% of the increase in funding for every learner. However, a considerably higher share of funding increases was reported for more significant disparities in the utilisation of assistant teachers, mostly little-trained personnel, non-teaching personnel and non-personnel matters, such as learning materials and specialised facilities. Sibieta (2015) suggests that variances in expenses between the least and most disadvantaged schools are less than funding disparities, with most disadvantaged secondary schools aiming for more unused funding.

Spending on schools signifies a significant share of public service expenditure in England. In 2012-13, overall expenditure on schools represented 57 billion pounds or around 23% of the overall service expenditure in England, exclusive of social protection, which is the second-largest section of public service expenditure after health. Furthermore, school expenditure per learner increased by an average of more than 5% annually between 1999-2000 and 2009-2010 (Chowdry, Muriel & Sibieta, 2010). However, since 2010, it has been protected realistically, despite significant cuts to other public expenditure areas. Considering how this additional expenditure translated into funding for different school types, overall inputs can offer valued insights. Firstly, from a taxpayer's viewpoint, it is imperative to understand the significant increase in expenditure offered in terms of additional inputs and if this characterised value for money. Secondly, taxpayers need to understand how the different funding levels show how the education system in England is changing, mainly as the increases target disadvantaged schools. Thirdly, as schools in England have high budgetary autonomy, it can offer important lessons about how schools make financial decisions in a vastly decentralised decision-making system (Sibieta, 2015).

In England, school funding is a two-pronged system. Firstly, the central government distributes funds to Local Authorities (LAs) grants, guided by learner numbers in the Local Authority (LA) and educational needs with funding generated utilizing general taxation. Nevertheless, since 2004 the primary grant allocated to local authorities, which is currently the Dedicated School Grant, has been raised chiefly through established

percentage per learner terms (Sibieta, 2015). Thus, funding differences per learner across local authorities (LAs) have mostly displayed historical differences in funding per learner since 2004. Secondly, LAs use 'fair funding' criteria to distribute school funding in their locality. These criteria frequently cover deprivation standards and educational needs, as LAs were required to include them from 2002-2003 (West, 2009).

Additionally, during the 2000s, there was an increase in the use of specific grants. These grants were offered directly from the central government to individual schools based on a set formula. Grants were inclined to focus on disadvantaged schools to make the funding system more directed at deprivation than it otherwise would have been (Chowdry et al., 2010). Since 2010-2011, these specific grants have been moved into the central Dedicated Schools Grant. In addition, since 2010-2011, the coalition government has introduced a pupil premium for the disadvantaged, which offers secured additional funding for learners categorised as disadvantaged; there was 1,300 billion for learners in primary schools who were entitled to free meals and 935 billion for learners in secondary schools (Chowdry et al., 2010). This funding added to the funding directed at deprivation.

3.2.3.2 The National Funding Formula

In England, the government implements a solitary school funding reform system. Belfield and Sibieta (2017) observe that the reform introduced during the 2018 and 2019 financial years replaced the 152 various school funding formulae with a single National Funding Formula (NFF). Roberts (2019) defines NFF as a funding distribution system comprising learner-centred and school-centred funding. Furthermore, learner-centred funding considers variations in learner enrolment and backgrounds, for example, per learner allocation and deprivation funding. On the other hand, school-centred funding does not vary based on learner enrolment and background. For example, school funding for 2020 and 2021 was fixed at £114,000 (Roberts, 2019). The NFF seeks to ensure that similar schools in various parts of England receive similar funding. Although this has been the aim of previous governments, they have constantly failed to be decisive on reforms such as the NFF. The government is commended for reforming funding and justifying the reasons for such funding changes, allowing effective analysis.

The new funding formula has been effective since April 2018, and the government has embarked on transitional protection, adding expenses to approximately £300 million in 2019 and 2020 (Belfield & Sibieta, 2017). Temporarily, this estimation puts around 0.7% to expenditure per learner. Belfield and Sibieta (2017) assert that the transitional protections indicate that no school experienced budget declination over 3% between 2017 and 2018 and 2019 and 2020. The financially disadvantaged schools, with low funding levels per learner, voiced their concerns, as they were not benefitting significantly from the reform, and some ended up losing the funding. This suggests that these reforms are not meant to decrease funding disparities in all schools but to lessen funding disparities in schools with standard features. Therefore, these reforms, to some extent, do not significantly benefit financially struggling schools.

Reforming the school funding system in England is imperative and similar schools should get similar funding allocation. Reaching this outcome will undoubtedly make some schools benefit financially whilst others will not. In the past, the funding model was two-fold, as the government allocated funding to LAs, and LAs then directly allocated grants to schools in terms of locally arranged formulae (Sibieta, 2015). These formulae looked at significant factors, such as school learner enrolments, disadvantaged learners and other school costs-related factors, for example, rates, bills and staff costs (Belfield & Sibieta, 2017). The NFF regulates government school funding within each area. Over and above the NFF, schools receive allocation through the Pupil Premium funding directly from the central government and local authorities to cover specific extra teaching and learning costs regarding special educational needs (Sibieta, 2015).

3.2.3.3 *The Pupil Premium Model*

The Pupil Premium (PP) model was enacted in 2011 in England. It is a public funding model designed to take care of the disadvantaged learners in England schools. It is offered as distinct funding in addition to the Dedicated Schools Grant (Foster & Long, 2018). The main aim of PP funding is to decrease academic achievement gaps between learners from poor and affluent families (NASEN, 2014; Copeland, 2018). This shows

how schools utilise their allocated funding to enhance the quality of education for poor learners. PP funding does not affect the implementation of NFF in schools, as defined and discussed in the previous sub-section. In 2019 and 2020, funding was allocated to the following categories of learners: disadvantaged learners who had been qualifying for free school meals (FSMs), which includes 1320 pounds for primary learners (newcomers to six-year-olds) and 935 pounds for secondary learners (seven to eleven-year-olds); it also includes 2300 pounds for every child looked after by an English local authority and 2300 pounds for every child whom England or Wales LAs no longer took care due to adoption, guardianship order, a child arrangement order, or a residence order (Foster & Long, 2018).

Additionally, a Service Premium of 300 pounds was paid to all learners having parents working in the armed forces. The Service Premium was also offered regarding children receiving an income due to the War Pensions Scheme or the Armed Forces Compensation Scheme because of their parents' deaths or injuries while on duty (Gorard, Siddiqui & See, 2019). The PP model was used for educational funding of learners enrolled at those schools and those enrolled at other schools entitled to government funding and community amenities.

How PP funding is allocated is subject to the school type and the PP component. The PP takes care of financially disadvantaged learners in government schools. These schools include maintained schools, funded by the local authority in quarterly tranches and transferred to schools to benefit financially disadvantaged learners. The Education and Skills Funding Agency funds specialised schools quarterly (Education and Skills Funding Agency, 2018). The Funding Agency distributes PP funding to LAs for disadvantaged learners. Previously it catered for children in government hospital schools and specialised schools not looked after by the LA but paid total tuition fees. Local authorities quarterly passed PP funding for learners in non-maintained special schools (Foster & Long, 2018). Alternatively, the LA would transfer the funding to the service provider to spend it on extra educational support to advance quality education standards for the financially disadvantaged.

3.2.3.4 Deprivation Funding Model

The unequal educational outcomes and significant influence of socio-economic circumstances in the UK partially reveal an inefficient running deprivation funding system in England. The central government currently offers extra funding per deprived learner in a Local Authority (LA) of approximately 4 000 British Pound Sterling (GBP) annually. On average, LAs transfer approximately GBP 3 000 per deprived learner to schools; the difference is distributed across all schools within the LA. The complex transfer system makes it hard for LAs to realise the share of deprivation funding in their total grants. This suggests that LAs' deprivation funding is not aligned with government priorities. Deprivation funding may seem unfair for schools with a small number of disadvantaged learners. Therefore, deprivation funding must take into consideration the circumstances of the LAs (OECD, 2007).

Schools also face incentives to spend less on disadvantaged learners. Firstly, the complex funding system may cause schools to miscalculate the implicit deprivation funding they obtain. Secondly, if deprivation funding is less than the schools' expected costs, they may get involved in "cream-skimming", which implies discouraging disadvantaged and recruiting additional gifted learners. The lag in getting deprivation funding offers an incentive for some schools not to recruit or retain disadvantaged learners (Sibieta, Chowdry & Muriel, 2008). Schools also appear to spend meaningfully less on disadvantaged learners than they would say is suitable.

3.2.3.5 Disadvantaged schools in London

Following the introduction of strict measures by the Coalition Conservative Government in 2010, widespread funding cuts to schools in England meant that many schools underwent challenges with their finances as their budgets could not maintain the rising costs, such as staff salary and insurance costs (Roberts & Bolton, 2017). In the context of prevalent funding cuts, schools must endure the challenges of assessment changes and curriculum accountability demands (Maguire et al., 2019). For all schools, funding pressures meant that head teachers must reduce resources and staffing. This includes

reducing the numbers of teaching staff and support staff, reducing funding for children with special educational needs and disabilities (SEND) and rescheduling or reducing costs on school maintenance (NAHT, 2019). Headteachers in some primary schools also reduced school hours due to the funding crisis (NAHT, 2019, Richardson, 2017). These finance and resource challenges are predominantly severe for disadvantaged schools serving poorer communities.

These disadvantaged schools tend to be categorized by higher than average levels of children receiving pupil premium funding, a measure for publicly funded schools in England to improve the achievement of disadvantaged learners and bridge the gaps between them and their more advantaged learners. They are also characterised by low attendance levels, a higher average proportion of children experiencing emotional and behavioural problems and learning difficulties, and a higher than average staff turnover (Pratt-Adams, Burn & Maguire, 2010). In early 2019, a Sutton Trust survey reported that head teachers in most disadvantaged schools are twice as expected to use pupil premium funds to address gaps in their budgets than head teachers of the least disadvantaged schools (Sutton Trust, 2019). At a time of substantial cuts in school budgets, the burden on disadvantaged schools to attain and sustain high standards has become stressful as head teachers frequently depend on additional resources to guarantee that learners participate positively with other schools in more advantaged contexts (Lupton & Thrupp, 2011).

3.3 EDUCATION FUNDING MODELS IN DEVELOPING COUNTRIES

Education is regarded as a fundamental human right essential for human development. The United Nations (UN) Sustainable Development Goal (SDG) for education considers equitable access as an important aspect of quality education for improving societies and bringing about the sustainable development of countries (UNESCO, 2014). While significant progress has happened in improving access to education in developing countries, this has not resulted in better-quality education. To realise the SDG targets by 2030, UNESCO has projected that more than twice the current funding formula is needed in developing countries. Insufficient funding for better-quality pre-primary, primary and

secondary schooling in these countries has been limited (UNESCO, 2015). This implies that funds utilised for teaching and learning activities are most likely to improve the quality of education. The following section will review the literature on the funding models of three developing countries: Nigeria, Zimbabwe and South Africa.

3.3.1 Nigeria

In Nigeria, education is regarded as a direct, all-effort, conscious process created by society to accomplish particular desirable objectives in terms of individual and societal needs (Fanfuwa, 2006). It is crucial to indicate that education goes beyond schooling, whilst schooling helps to advance quality education. Educational funding as an area of public finance involves features that include funding sources and how income targeted for education is used to buy goods and services (Borokhovich et al., 1998). On the other hand, public funding defines the collection and distribution of funds for public use. It is viewed as the financial transactions of public systems regarding taxation, expenditure and loans. Public funding embraces the provision for expenses that involve recruitment, resources, and maintenance of schools (Charles, 2014). From the preceding definitions, it is essential to note that without effective management and funding for education, the overall education system would be completely disorganised. Therefore, education must be used as a valuable instrument for national development. Because of this, the Federal Republic of Nigeria (FRN) prioritises education financing to surpass the 26 % UNESCO minimum standard for developing countries (UNESCO, 1999).

3.3.1.1 Nigerian Education Funding

Education funding is the distribution of resources which involves expenditure on human resources, equipment and maintenance of schools to improve the quality of education (Charles, 2002). In my definition, education funding refers to the funding sources and expenses for financing teaching and learning activities to attain satisfactory academic performance. Omoike (2013) described funding sources to include: state-allocated budgets, tuition fees, companies, donors, sponsors, communities, alumni formations, parents-teachers associations (PTA), churches, revenue-generating initiatives, taxation

funds and school development charges. Although there are various funding sources, education funding remains a challenge in Nigeria, as the standard of education is still unsatisfactory (Omoike, 2013). Although learner registration at primary, secondary and tertiary institutions is increasing in Nigeria, the government's budget is decreasing consistently (Osarenren-Osaghae & Irabor, 2018). Nigeria's education funding has undergone numerous policy changes, such as teaching and learning programmes, funding and other reforms. Education remains a challenge to all stakeholders, as all these problems are attributed to unsustainable and inadequate funding (Nwanchukwu, 2014; Aigboje & Ehiaguina, 2016). The downfall of Nigeria's Universal Primary Education (UPE) funding crisis further proves that insufficient funding from the mid-1970s to the 2000s has resulted in unpaid teachers' remuneration, dilapidated schools and inadequate services (Eyiche, 2012). Consistently, this has impacted the attainment of educational goals and rendered the education administration unsustainable in Nigeria. This suggests that there have been continuous government funding challenges to schools. These have led to unacceptable systematic conditions.

Nigeria regards education as essential for redressing economic, political, sociological, and human resources development inequalities. Nigeria aspires to have strong economic development, a stable political system and a solid educational foundation. In Nigeria, the basic education level is considered the foundation for the secondary and tertiary levels. It involves training quality teachers, school funding, monitoring and availability of resources and stakeholders' involvement (FRN, 2004a). Basic education initiatives advance the education objective that "no education system can rise above the quality of its teachers and that teacher education shall continue to be given major emphasis in all educational planning and development" (FRN, 2004a:39). The National Policy on Education states that quality education can only be offered if the government prioritises teachers and their working conditions, as they are education implementers. In Nigeria, quality education is the most important factor contributing to nation-building.

In transforming its education funding, Nigeria believes that quality education can be achieved through allocating sufficient resources, such as qualified teachers (FRN, 2004b; Edem, 2006). In other words, the Nigerian government desires to provide adequate

funding to advance quality basic education. Nigeria focused on funding basic education to advance free and compulsory Universal Basic Education (UBE) regarding infrastructural needs, quality teaching resources, teachers' support, and educational technology (Oralu & Oladele, 2015). This means quality education needs adequate funding and resources. Education funding impacts the provisioning of facilities, equipment, and buildings. In Nigeria, the funding sources include the federal and state governments, tuition fees, businesses, consultancies, community participation, endowments, and international organisations such as the World Bank (Ubogu & Veronica, 2018). This suggests that educational funding needs other funding sources, in addition to government funding, to promote quality education.

3.3.1.2 Universal Basic Education Model

In 1976, the Universal Primary Education (UPE) had challenges that led to its downfall in Nigeria. Then, the federal government established the UBE model in 1999. This was followed by establishing a free, compulsory Universal Basic Education Act 2004, pronounced by the Federal Republic of Nigeria (FRN) (2013). UBE is education for children from 0 to 15 years. It covers early childhood education (0 – 4 years) and ten-year formal schooling. It is universal, compulsory, free and qualitative to guarantee the actual application of the UBE programme and subsequent achievement of its aims. The free, compulsory UBE Act 2004 led to the formation of the Universal Basic Education Commission (UBEC) nationally and State Universal Basic Education Boards (SUBEBs) at state levels concerning the agreed roles, association structures and terms. Its aim concerns delivering free, compulsory basic education for everyone to allow people to obtain relevant life skills, literacy and numeracy standards.

The UBE model was developed to care for disadvantaged communities, rural societies, the disabled, the girl child, the nomadic, the *almajiri* and the trend of boys leaving school early. The UBE is believed to influence employability and national development. The UBE scheme was considered a plan to impart the children of Nigeria with foundational knowledge and skills that could allow them to adapt to the changing situation in which they exist. The action was to develop a well-defined vision so that the education

processes could positively contribute to building a knowledge-founded economy through policy change and curriculum improvement. Generally, the idea is that the knowledge-founded economy entirely relies on an educated labour force to participate in different economic sectors.

3.3.1.3 *Fiscal Federalism*

Fiscal federalism is the presence of more than one level of government in one government, each with different revenue-generating and expenditure responsibilities. It leads to intergovernmental fiscal relations that allow the federation to attain the total benefits of decentralised fiscal responsibility while, on the other hand, conserving the efficiency and equity of the national economy (Raji, 2004). In Nigeria, several matters in education funding are entrenched in the prevalent problem of fiscal federalism.

The delivery of centrally attained revenues comprises two types of administration: (a) between the federal administration and all state and local administrations, which means vertical revenue sharing, and (b) across-state administrations and across local administrations, which means the horizontal revenue sharing (Raji, 2004). The federal government controls the primary sources of income, such as imports and levies, companies' income tax, petroleum sales tax, mining charges and royalties, and petroleum profit tax (Raji, 2004). Local government taxes are small and relatively inflexible. This creates some difficulties in raising independent revenue. This is the justification for their overdependence on allocations from the federation account. This leads to a sharing of revenue across state and local governments, equity of states, social development factors and internal revenue efforts.

3.3.1.4 *Education Funding and Human Capital Development*

Education financing is at the centre of the education crisis in most world countries. In Nigeria, there seems to be a persistent crisis of funding and a lack of fixed structures and strategies in education funding (Olure-Bank & Olayiwola, 2017). Given the economic revolution that is taking place in the fast developments in information and communication technology (ICT), any country that wants to be recognized globally must be exceptionally

advanced in education. This initiative conforms with Owoye and Onafowora (2010) that the educational objectives in any country characterise the country's statement of intentions concerning what feature of its social, political and economic needs and aspirations the educational system should address.

An analysis of the country's history would show that education's role has always been valued. Despite the articulation of objectives, what is clear is that all the initiatives introduced have not been adequately implemented due to unsustainable funding (Olure-Bank & Olayiwola, 2017). The Universal and Compulsory Primary Education (UPE) was the introduction in 1976. It did not consider the number of classrooms needed, the number of qualified teachers available and the extent to which available resources may last. Over thirty years after that initiative, the education sector at all levels is still considered poor due to the funding crisis and definite structures and strategies to address the problem, according to Eyiche (2012). He further says that this poor funding of Nigeria's education from the mid-1970s into the 2000s caused extensive cases of unpaid teacher salaries, school infrastructure and unavailability, dilapidation, and grossly inadequate equipment. This makes the effective management of the education system and the situation intolerable; either the teachers or the students will revolt. As a result, the situation could lead to demonstrations, strike actions and extended closure of the schools, which will cause severe damage to the quality of education.

The challenges of Nigeria's education system and its funding can be tracked from policy and strategy instability and inconsistency, ineffective management, wastage and leakages by overriding macroeconomic conditions that determine the education sector (Olure-Bank & Olayiwola, 2017). The economy has not been increasing at a reasonable high and sustainable rate to have the resources to fund the education sector in Nigeria with a tremendous population growth rate. The slow GDP growth indicates intense resource limitations, leading to the poor resourcing of education, as evidenced chiefly during 1970 – 2013 (Olure-Bank & Olayiwola, 2017). During this period, Nigeria recorded negative GDP growth rates. Therefore, education has been poorly funded during these years.

3.3.2 Zimbabwe

Zimbabwe is a land-locked country in Southern Africa which attained its independence from Britain in 1980 after prolonged liberation war. The country shares borders with South Africa, Mozambique, Zambia and Botswana. It has a centralised government and has ten administrative provinces: Bulawayo, Masvingo, Matabeleland South, Matabeleland North, Harare, Midlands, Manicaland, Mashonaland East, Mashonaland Central and Mashonaland West. Bulawayo and Harare are metropolitan provinces consisting of the second biggest and capital cities, respectively. The provinces are divided into 72 districts. The population of Zimbabwe is, on average, growing at approximately 1.1% yearly. Rural areas are projected to take up 67% of the population, and peri-urban/urban areas take up 33%. Harare and Bulawayo occupy nearly 30% of the population in urban areas (Ministry of Primary and Secondary Education (MoPSE), 2016).

3.3.2.1 Education Funding in Zimbabwe

Schools and non-formal education (NFE) institutions have been affected mainly by a lack of funding that caused millions of children not to have access to education. The quality of education has also been affected by a lack of qualified teachers, as indicated by the fact that more than 60% of primary school children failed their national examinations and could not proceed to secondary school (UNICEF, 2014). The Zimbabwean education sector has suffered from inadequate resources, poor budget allocations, unreliable teacher remuneration and incentives, inadequate teaching and learning materials, poor infrastructure, and low enrolments (Bruns & Rakotomalala, 2003).

Historically, education funding in Zimbabwe has been the obligation of the government. In addition, international donors provided loans and donations to the government of Zimbabwe to finance services such as the building of schools, payment of teachers' salaries and curriculum matters (Ranga, 2013). Education had to be mainly funded to cover many poor communities. However, poor communities did not benefit from the funding. This was because of the economic challenges that Zimbabwe had been experiencing (Ranga, 2013). Since the economic collapse in 2008, education has been

deprioritised in the country's budget. The total budget for education was less than 20%; in 2016, the total budget spending recorded was 8.4% only (Changamire, 2017). The education humanitarian funding share has decreased since 2010, despite the rising number of children who do not attend school (UNESCO, 2014). UNESCO confirms that, since 2008, the funding share has decreased by more than \$1.3 billion. As Zimbabwe is usually characterised by continuing struggles, disasters and forced displacements, many children are not attending school. This was the main reason humanitarian funding was made available in Zimbabwe due to the disasters this country had been experiencing (Jahre and Heigh, 2008). It suggests that poor funding and the country's social ills negatively impact education, as there is no financial stability.

3.3.2.2 *Cost Recovery Funding Model*

Education reforms would not have been possible in Zimbabwe if the government had not received financial assistance to fund the provisioning of education. The failure of the government to carry on with funding responsibility was transferred to parents, as their children were beneficiaries (Mutigwa, 2018). The government reduced expenditure on non-essential services as recommended by the Economic Structural Adjustment Programme (ESAP) requirements, established by the International Monetary Fund (IMF), as parents were obliged to pay school fees for their children to comply with the requirements (Mutigwa, 2018). Schools levied fees to meet the education expenses. This happened as the Education Ministry approved the fees increase following the Consumer Price Index (CPI). This was despite the parents holding an Annual General Meeting (AGM), wherein 66% of the parents attending the AGM approved the budget to increase funds (MESAC, 2006).

Nevertheless, the government became responsible for essential services. Remuneration of teachers and education grants were divided into 45% rural schools, 30% high populated suburbs and 25% low populated suburbs (MESAC, 2010). This allocation complies with the Millennium Development Goals in guaranteeing that learners receive suitable services and that their access to education is always promoted.

3.3.2.3 Basic Education Assistance Model

Following the challenges that vulnerable children were facing, in 2001, the government of Zimbabwe passed the Basic Education Assistance Module (BEAM) programme, which focused on access to education as an intervention for social protection (Gwirayi, 2010). BEAM was planned to help register and retain vulnerable and orphaned children by offering them all school-related fees. This was done in line with the Education Act of 1987, which unconditionally regards education as a fundamental human right, and the UN Convention on the Rights and Welfare of the Child Article 28 (e), which firmly expresses that “state parties should take measures to encourage regular attendance at schools and the retention of drop-out rates”.

BEAM is a state model applied in sixty-one districts in both the rural and urban parts of Zimbabwe. However, some legitimate beneficiaries were excluded from this programme, thus violating these children's educational rights, as embedded in the legislation mentioned above. Manyanye (2012) postulates that not all children access funding through BEAM, implying that most children are deprived of their rights to quality education.

In Zimbabwe, the print media was outspoken when the BEAM programme was started. For example, the Chronicle of 6 February discovered that insufficient funding meant the government's vision and pledge to defend children's educational rights and attempts to achieve the Millennium Development Goal (MDG) 2, which pursues unhindered compulsory primary schooling, might not be possible to attain if the administration was unable to get funding assistance. According to Ezron (2015), the former Minister of Education complained, "The government is allocating insufficient funds to education, and if we are to ensure that the children at least get primary education, this must improve significantly. BEAM is a symptom of a bigger problem”.

3.3.2.4 Civil Society Participation Model

Education is a societal issue. Therefore, all people in society must participate positively as stakeholders in educational matters. It is thus essential to extend education funding to

civil society and regard this as another financing mechanism for education (Changamire, 2017). Therefore, civil society needs to support the financing of education. The Civil Society Participation Model (CSPM) supports education financing by involving civil society in funding education. It also involves other stakeholders interested in education to support it financially, such as donors, communities and the private sector (Steer & Baudienville, 2010). Historically, civil society hardly had direct involvement in education matters and was not involved in decision-making processes (Benavot et al., 2010). This non-participation of communities had an impact on education development and reforms.

Advancing quality education is likely to happen when everyone regards education as a social issue. Civil society participation in financing education is an alternative model to the current funding models in Zimbabwe. Firstly, promoting active citizen participation will create more accountability through shared decision-making. Secondly, civil society participation may let citizens promote and support appropriate funding levels for all levels of education: namely, primary, secondary and tertiary, rather than a large portion of funding allocated to higher education (Changamire, 2017). Civil society participation will make a robust and focused approach aimed at programs they can take care of. In addition, civil society participation promotes school independence and citizens' decision-making and supports quality education delivery (Changamire, 2017). This implies that civil society could improve the conditions for delivering quality education if they are directly involved in the financial affairs of their school communities.

3.3.2.5 School Fees Collection System

In Zimbabwe, school fees become a severe challenge to the school management and parents when schools open. This is because schools must buy teaching and learning materials before opening schools. It seems difficult, as many parents cannot meet their financial commitments on time, and their budgets are exhausted when the schools close. Under these conditions, the school management would have no choice but to compel parents to pay their school fees timeously. School management would therefore chase learners away from school on the first day of the term. This impasse led to conflicts between the parents and school management. The school management required parents

to pay fees before the start of the term, as guided by the Government of Zimbabwe's School Regulations (GZSR, 2011). This is required from parents, even though they are required additional time to settle the fees, citing the economic collapse as their reasons for not being able to honour their payments timeously. The government and school authorities had to formulate the best options for collecting school fees which did not infringe on the learners' fundamental rights.

The schools and parent bodies are permitted to refuse to register a learner whose fees are payable. This must follow the agreement of the parent body, consistent with directions specified by the Secretary for Education (GZSR, 2011). This seeks to protect the learners' rights from procedures schools may impose to dehumanise them (Matimbe, 2014). These practices directly breached the non-segregation laws of learners for defaulting on their school fees (Mashudu, 2015; Mthethwa, 2015). It caused turmoil among parents, which also aroused the sympathy of the politicians. However, as schools are a corporate body, which may take legal action or be litigated (GZSR, 2011), the statute regulates the disputes which generally originate from non-payment of fees by guiding schools confronted with such a dilemma to proceed to the courts to recover school fees. It becomes difficult for schools which habitually function on a shoestring budget. The endorsed legal route is not generally feasible because of the amount it would attempt to recover.

Schools would choose to send learners home to collect fees, which is regarded as unlawful. Dynamic schools invite the parents to come to the school and formulate a viable payment plan appropriate to both parties. However, difficulties persist when the parent cannot comply with the agreement (Moyo, 2015). Other ways of recovering fees are engaging parents to do menial jobs, which are equal to what they owe the school (Ulusoy & Yolcu, 2014). However, others regard this practice as ill-treatment of the parents by the school authorities. At secondary schools, learners would be compelled to do manual jobs equivalent to what they owed or have their results withheld to enforce payment by parents, which courts could still regard as illegal (Mashudu, 2015). This discussion suggests that school managements face challenges relating to statutes and the economic conditions on the ground to achieve changes in their schools. Therefore, it is imperative for suitable

means of recovering owed fees from the parents to be considered so that there is no infringement of the learners' education rights and impoverishment of the parents.

3.3.2.6 Rural Education Development

Teaching in marginalised rural areas of Zimbabwe has the impact of lack of resources, unmotivated teachers, and the unwillingness of the government to address these challenges. Therefore, insufficient educational infrastructure is associated with severe poverty in rural Zimbabwe by decreasing productivity and earning capacity and increasing contact with severe poverty (Gandure, 2005). The inadequacies of education services in rural areas are linked to the country's lack of adequate infrastructure, educated people's unwillingness to live in rural areas, and lack of resources and infrastructure to plan and offer effective education services to the rural population (Mazvimavi & Twomlow, 2011). For example, in most satellite schools known as new fast track schools, schools under trees and the shades are still prevalent and influence access and quality of education. Rural schools lack an inadequate curriculum and textbooks with contents in most cases not relevant to the rural population's needs. Mupangwa (2011) and IFAD (2013) emphasize that the type of teaching in rural government schools has not been of better quality even with the application of the Nziramasanga Inquiry into Education which led to the 1999 draft proposal. The proposed thematic curriculum involved several learning areas with added subjects. It gave rise to the shortage of qualified teachers as the government started implementing the new curriculum without adequate measures. The new Zimbabwean curriculum, endorsed, started to be implemented in 2017. The implementation of a curriculum suitable for rural learning is regularly as well restricted. Hence, education advancement refers to advancing learning achievement by providing effective leadership and financial support to rural training programs that directly influence teaching and learning activities. This is the definition by UNDP (2011) as education embraces learners who are well taken care of, safe, healthy, gender sensitive and prepared to learn.

Education is a significant component of total factor productivity and not only rural development. The most significant critical element of education is that it is an investment

that produces externalities (Boser, 2014). Most African countries experience challenges in providing an educational environment which promotes rural development. In rural areas of Zimbabwe, education is characterised by many challenges due to a lack of resources and unmotivated teachers. It is thought-provoking that poor education quality is related to rural areas' poverty levels. Education in rural areas is troubled by the country's economic deterioration and rural teachers' inability to deliver quality education due to poor infrastructure. There are many schools under trees with five or more learners sharing one textbook, impacting access to quality education.

The national unity government (2009-2013) observed UNICEF giving textbooks donations to schools to promote quality education. However, most schools no longer have donated books, and rural schools do not have relevant materials due to the implementation the new educational curriculum (Dzvimbo, Monga & Mashizha, 2017). The new educational curriculum puts extreme pressure on the limited rural educational infrastructure that has consequences on quality. Education advancement in rural areas supports and empowers people to participate globally in the knowledge-based economy. NGOs provide good coordination of the most important funding sources for education, and they influence rural development. Okidi and Mugambe (2002) argue that for rural areas' development, one of the main challenges is coordinating the most important funding sources for achieving the most significant effects in rural development.

Rural schools in Zimbabwe, like all other rural schools globally, experience barriers to enhanced student learning due to poor funding, limited resources, staffing, inadequate mentoring support, schools remotely located and serving high poverty communities, limited economic opportunities, paucity of family social and cultural amenities, low population density, family isolation and community remoteness; daily life patterns shaped by rural geographies and low educated communities (Emerging Voices, 2005; Redding & Walberg, 2012).

Rural primary schools in Zimbabwe are placed in remote areas. Typically, there is a lack of infrastructure; most schools are severely under-resourced, and teachers often must improvise and be creative (Mukeredzi, 2009). Frequently teachers in rural communities

are either newly qualified or professionally unqualified, as competent, qualified and experienced teachers reject rural posts mentioning geographical isolation, socio-economic conditions and the overriding discourse of deficiency that views rural teaching as inferior (Pennefather, 2011; Mukeredzi, 2013).

Whilst all newly qualified teachers are deployed to rural schools, as it is in these schools that there is repeatedly extreme need (Murerwa, 2004), there are mostly no structures responsible for beginner teacher induction programmes. School principals expect beginner teachers to have the ability to perform as experienced teachers when they enter the system (Mukeredzi, 2009). Buchanan et al. (2013) comment that as the two parties meet, in most instances, they are uncertain of what must materialize in carrying on with their duties. Some practising teachers may see the new beginner teachers as threats, while others expect them to perform their routine teaching duties.

3.3.3 South Africa

The South African education sector comprises two departments: the DBE and the Department of Higher Education and Training (DHET). The DBE is in charge of primary and secondary schools, and DHET is in charge of tertiary and vocational education (Green, 2011). Before 2009, the DBE and DHET were known as the Department of Education. The DBE controls Early Childhood Development (ECD) centres, public schools, independent schools, and special education needs schools. Public and independent schools include approximately 97% of South African schools (Green, 2011). The DHET is in charge of Further Education and Training (FET) colleges, Higher Education Institutions (HEI) and Adult Basic Education and Training (ABET) centres (Ntombela, 2011). South Africa comprises the following nine provinces: Eastern Cape, Limpopo, Northern Cape, Gauteng, Mpumalanga, Kwazulu-Natal, Northwest, Western Cape and Free State. These provinces have the PEDs in charge of executing the DBE policies and dealing with provincial education matters (Mes and Singh, 2007).

3.3.3.1 School Financial Management Legislative Context

Section 29 (1) on the Bill of Rights of the Constitution of the Republic of South Africa, Act No. 108 of 1996, establishes the right to education. This provision implies that all children of the required age must attend school irrespective of whether they can fund their education (RSA, 1996a). Additionally, Section 34 (1) of the South African Schools Act (SASA), Act No. 84 of 1996, prescribes that the government must allocate school funding from state monies equitably to pursue the learners' education rights and redress education inequalities. Section 39(1) of SASA further directs that public schools may determine and charge school fees provided; such a decision is to be approved by most parents attending the parents' meeting (RSA, 1996b). In line with the preceding stated legislative provisions, public schools source funds from the state and individuals and, in many cases, from parents within the school community (Van Rooyen, 2013).

The NNSF policy allocates funding to schools (RSA, 1996b). Similarly, the policy equitably allocates funding to the poor and the rich (Gallie, 2013). The funding norms enable the DBE to distribute monies following the school's needs. Funds allocated to public schools are supposed to be administered per Sections 20 and 21 of SASA (RSA, 1996b). Section 20 accords SGBs the powers to execute overall functions only, while Section 21 gives SGBs added financial autonomy. Section 21 schools are obliged to carry out substantial financial management. The SGB must run their financial affairs appropriately (Bisschoff & Mestry, 2009). Section 21 schools are regarded as self-managing schools due to the extra-autonomous financial roles they are supposed to execute as school governors (Botha, 2013). Section 21 prescribes the SGB-allocated functions that a governing body may make to the Head of Department requesting any of the following functions: maintaining and improving the property of the school, buildings and sports fields, as well as hostels, if applicable; choosing the schools' extra-curricular activities and choose school subjects according to the curriculum regulations; to procure teaching and learning support materials and payment of services.

The Head of Department (HoD) allocates section 21 functions to the school, provided the school has the recognised capacity. The consideration is that the school has efficient

financial management and complies with the stipulated provisions in SASA (Mestry, 2004). SGB empowerment in financial management indicates a transformation in the school principals' responsibility as leaders and managers to include demanding financial obligations. Firstly, the principal is responsible for financial management and gives strategic guidance on financial administration. Secondly, the principal is supposed to guide the SGB in their financial responsibilities instead of inactively acclimatising the SGB to the financial management processes and changes. School principals ought to acquire innovative accounting practices and technological, financial management. As financial managers, school principals must be creative and use the state-allocated resources to support the SGB in their quest to supplement the school's financial resources.

Section 20 of the SASA directs the SGB on their roles in managing school finances. SGBs should ensure that the school establishes a fund, prepares the annual budget, administers school monies collected, maintains good financial accounts, and ensures that financial records are audited, and resources are augmented (RSA, 1996b; Mestry, 2010). In secondary schools, the SGB includes teachers, parents, learners, non-teaching personnel and school principals in their departmental positions, which are automatically included (Heystek, 2013). The amended Section 16A of SASA outlines the duties of a public school principal. According to Section 16A of SASA, principals, by virtue of their departmental position, represents the HoD. Their responsibilities include utilising and managing teaching and learning support material, recordkeeping, advising the SGB on policies and legislation and supporting the SGB in their governance responsibilities. The HoD is a Provincial Education Department (PED) accounting officer. This implies that the principal is an accounting officer acting on behalf of the HoD in the SGB (Mestry, 2010).

3.3.3.2 *The National Norms and Standards for School Funding Model*

Since 1996 education reforms have paid attention to equity, access, redress, efficiency, quality and democracy. The government has undoubtedly made excessive efforts in striving to address education equity and imbalances of the past. This is confirmed in various education regulations, for example, the educator-recruitment standards, rationalisation of teachers, school fees management, the SGBs functionality and the

NNSSF (Mestry & Dzvimbo, 2011). Section 34 and 35 of SASA compels the government to redress past imbalances and address equity to reform the education system (RSA, 1996b). Equity and redressing the past inequalities promote the realisation of Social Justice. Section 34 of SASA demands that public schools be funded equitably to ensure the rights to education and address inequalities of the past in delivering quality education. Section 35 of SASA prescribes how the government executes the duty defined in section 34 of SASA.

Two relevant provisions in sections 34 and 35 of SASA require some scrutiny: (1) Section 35(2)(b) affords for the creation of different learners' quintiles. This provision has, nonetheless, not been accomplished. However, as an alternative, the NNSSF ensure that the learners' quintile allocation is always similar in all public schools where the learners are registered. (2) The conditions in classifying schools to a specified quintile are characterised by discrepancies because revenue and the education level are privileged information. Furthermore, in most schools' learners do not reside in the school locality but travel daily to school. In several instances, schools were allocated incorrect quintiles, which disadvantaged learners as the wrong funding criteria were used to determine their state-allocated funding.

Until 2006, the state-allocated funding norms did not prescribe the minimum funding determinations for each learner. However, with provinces having varied fiscal strength, poor learners had to be funded differently across provinces (Wildeman, 2008). The inconsistency was evident when it was discovered that learners from rich backgrounds in a particular province were getting better funding than those from poor backgrounds in other provinces (Wildeman, 2008). This practice limited the capacity of many provincial education departments to implement a significant allocation of redressing funds to many impoverished learners. The average spending allocated per learner by the funding model was R275 in the Northern Cape and R184 in Gauteng, whilst in KwaZulu-Natal, the allocation was R35 per learner (Wildeman, 2000). The assumption was that because some learners were poor, they had to be allocated more resources than those from economically advantaged backgrounds. These data confirm that financially struggling learners are consistently deprived of quality education. It will take a while to overcome

the past inequalities, thus extending the poor cycle of quality education. Many poor and rural schools continue to fall under the lowest level of resource provisioning despite the positive reforms in education funding. In my opinion, funding regulations envisioned to redress past inequalities turn out to be causes of persistent inequalities based on the physical location of learners, class and race.

3.3.3.3 *Funding Allocation in No-fee schools*

State-allocated funding in South Africa is a joint obligation between the 9 PEDs and the Department of Basic Education (DBE). The PEDs are eligible for an equitable allocation of the state-allocated funding, part of which is intended for funding each school in a province (Marishane, 2013). The DBE prescribes norms and standards controlling state-allocated funding. The NNSSF seeks to redress inequalities and injustices of the past by funding learners from economically disadvantaged and poor communities. On the other hand, the norms and standards are amended to close the existing inequalities. This is done by providing more funding to poor and wealthy schools (Marishane, 2013).

In South Africa, school funding allocation is based on decentralisation policies implemented in many other countries (Caldwell, 2005; The World Bank, 2007). This implies that decision-making powers and the required financial resources need to be addressed at the school level to change schools for the better. This involves discussions where school principals, SGBs, and parents have the option to spend their budgets on improving the school infrastructure (Marishane, 2013). This implies that, even though in no-fee schools' parents who are unable to pay school fees are exempted from paying, they can still use the allocated funding to improve their schools and get closer to schools that have been historically advantaged. On the contrary, research indicates that notwithstanding the government's efforts to address equity in funding allocation for each learner, the provisioning of infrastructure and physical resources remains highly unequal at schools (National Planning Commission, 2010). For example, many schools are still without electricity, desks and chalkboards, and ablution facilities.

School infrastructure's educational value must be associated with school funding to advance quality education. School infrastructure refers to the physical, educational setting. In the South African context, it embraces water and sanitation, appropriate classrooms, laboratories and libraries (Marishane, 2013). This setting leads to some benefits for educational achievement. Firstly, school infrastructure contributes to the quality of education (UNICEF 2002, 2005). Research indicates a positive relationship between learning results and the physical background in which academic activities occur (Earthman, 2004; Higgins, Hall, Wall, Woolner, & McCaughey, 2005; Bullock, 2007).

Furthermore, research by Lee, Zuze, & Ross (2005) conducted in fourteen sub-Saharan African countries; found that outstanding learner attainment happens at schools with the required facilities, such as libraries, water and sanitation, electricity, and sports fields. Thirdly, in a study on the effects of school infrastructure on learner attendance and dropout rates, Branham (2004) has found that learners are demotivated to register at schools that require physical repairs, use temporary structures, and have non-teaching employee shortages (such as cleaners and maintenance workers). Lastly, the Council for Scientific and Industrial Research (2011) notes that while appropriate infrastructure increases access to quality education, poor infrastructure excludes learners from achieving quality education. The researchers mentioned above concur that infrastructure is essential in delivering quality education and that infrastructure maintenance should be considered when schools are funded.

3.3.3.4 Disparities in School Funding

During apartheid, there was unequal education provision to the different race groups. There were also different education departments, organised according to race. They all had different budgets and administrations. Historically, education funding was unacceptably unequal, as whites benefitted more, resulting in substantial educational disparities (Naicker, 2000). However, the dawn of a democratic dispensation heralded improvements in education for the blacks. Access to quality education is currently determined based on financial power. For example, formerly White schools, which were

in the past financially advantaged and provided a high-quality education, are still privileged.

Fiske and Ladd (2004) believe that while racial inequalities in school funding are minimal in the post-apartheid era, they are not entirely eradicated. For example, SASA gives extensive powers to SGBs, which according to Chisholm (2012), gives SGBs the powers to determine school fees to augment government funding. School spending is equalised based on teacher-learner ratios. However, the right accorded to SGBs to augment school funds ensures that schools in prosperous communities can use these fees to recruit additional teachers and take care of infrastructure, and in so doing, maintain quality (Chisholm, 2012). School fees also prevent black children from registering in the former white schools. Yamauchi (2011) stresses that affluent schools in South Africa tend to charge much school fees to prevent black children from enrolment. Therefore, black schools continue to be overcrowded, poor and of a low standard. Chisholm (2012) also stresses that the SASA made education compulsory but not free.

Consequently, affluent, resourceful schools belong to the white minority, whilst poor, under-resourced schools belong to the black majority, thus, making desegregation efforts complicated. Most black children attend formerly white schools, but no white learners attend black schools. Consequently, historically disadvantaged black schools remain unchanged regarding their racial profile.

3.3.3.5 Quintile Ranking System

In South Africa, school funding is uneven. The government's initiative of differentiated funding through the quintile system sought to address the needs of impoverished communities. School funding at all government schools is implemented through a poverty index known as the *Quintile Ranking System*. Schools have a ranking between 1 and 5, with the schools in the lowest quintiles getting more government allocation per child. Quintiles 1 to 3 schools are no-fee and legally prohibited from charging school fees. However, quintiles 4 and 5 schools have the autonomy to determine school fees to augment their finances to achieve quality education standards (Mestry, 2014; Mestry &

Ndhlovu, 2014). Charging school fees makes these two categories of schools resourceful, initiating fundraising activities and requesting donations (Sayed & Ahmed, 2011). On the other hand, the quintile ranking model for resource allocation is a good attempt by the government to alleviate low-income families from the financial burden of paying fees; it infuses the concept of education as an economic good.

On the other hand, no-fee schools receive all state-allocated funding from the government and are not allowed to make parents pay school fees, making them dependent on the government for their operations. They, therefore, depend on the government for such school needs as LTSM and services such as water and sanitation, as well as electricity, maintenance and repairs (Fiske & Ladd, 2004). Section 35 of SASA in relation to norms and standards on school funding provides that, (1) *the Minister must determine national quintiles for public schools and national norms and standards for school funding after consultation with the Council of Education Ministers and the Minister of Finance; (2) The norms and standards for school funding contemplated in subsection (1) must (a) set out criteria for the distribution of state funding to all public schools in a fair and equitable manner; (b) provide for a system in terms of which learners at all public schools can be placed into quintiles, referred to as national quintiles for learners, according to financial means; (c) provide for a system in terms of which all public schools in the Republic can be placed into quintiles referred to as national quintiles for public schools, according to the distribution of learners in the national quintiles for learners; and (d) determine the procedure in terms of which the Member of the Executive Council must apply the criteria for the distribution of state funding (RSA, 1996b).*

The researchers' interpretation is that many historically financially disadvantaged learners who live in townships and rural areas still attend schools that lack the required resources compared to their historically advantaged counterparts in the suburbs and cities. This results in parents from poor communities and families sending their children to schools outside the townships and rural areas, hoping they will receive quality education there. In so doing, the parents incur substantial transport expenses to transport their children to school and are subject to significant school fees. This places much financial burden on such parents.

3.4 SUMMARY

The literature review discussed the advancement of quality education through the national school funding models in disadvantaged areas of various countries. Three developed countries were covered: the USA, Australia and England. Furthermore, three developing countries were discussed: Nigeria, Zimbabwe and South Africa. In the next chapter, the researcher presents the research methodology for the current study.

CHAPTER FOUR

RESEARCH APPROACH, DESIGN AND METHODOLOGY

4.1 INTRODUCTION

The previous chapter reviewed the literature on the funding models of different countries. The framework serves as a foundation on which this study rests, as it outlines the philosophical perspectives from which the study was conducted. The present chapter focuses on the research approach, design and methodology. This chapter covers methodological aspects such as philosophical assumptions, theoretical perspectives, steps taken to ensure the quality of the research, and the ethical principles observed during the study. Based on the research problem and question, this study aimed to examine how quality education can be advanced through the national funding model in a rural South African context. This chapter explains the procedures followed in answering the research question. The main research question for this study was: How can quality education be advanced through the national school funding model in a rural South African context?

The following secondary questions emanate from the main research question:

- 4.1.1 How is the national funding model implemented to advance quality education in rural public schools?
- 4.1.2 What challenges do schools in rural communities face in implementing the national funding model to ensure quality education?
- 4.1.3 How do rural school principals and School Governing Bodies address the challenges emerging from the management of state-allocated funding to ensure quality education?
- 4.1.4 How are the educational resources used to advance quality education in rural public schools?

4.1.5 Which funding model could be adopted to address the challenges encountered in advancing quality education through national funding in rural South African schools?

4.2 PHILOSOPHICAL ASSUMPTIONS

Research approaches involve philosophical assumptions and different methods or procedures (Creswell, 2014). Bahari (2010) contends that research philosophy involves the nature of knowledge and its expansion in the social world. Bahari (2010), Gray (2013) and Toohey (2010) mention three main reasons why philosophy in research is essential. According to them, philosophy in research helps to form research designs, explains which designs are relevant and which are not, and finds designs that may be outside a person's past experiences. This study is based on a qualitative research approach encompassing numerous philosophical assumptions. Qualitative research has been chosen as it allowed the researcher to get data by eliciting various responses from participants in the field. Research by Punch (2011), Tracy (2013), and Saunders, Lewis and Thornhill (2012) presents three philosophical assumptions which guide most scientific research. These assumptions include epistemology, ontology and methodology, which are components of the qualitative research paradigm on which the study is based.

4.2.1 Epistemology

Epistemology is the philosophical assumption that deals with how people identify the correctness of things and how they validate reality (Repko, 2012). Epistemology is concerned with how to know and learn about the world and considers what constitutes the origin of knowledge and by what means reality can be learnt (Ritchie, Lewis, Nicholls & Ormston, 2013). Epistemological assumptions concern how knowledge can be formed, learnt and communicated. The researcher engages with the research participants about the elementary belief about knowledge and what can be known. Epistemology describes findings about the world and allows interpretations to be applied universally.

Therefore, epistemology is the philosophical assumption that relates to knowledge. In the current study, epistemology relates to the knowledge of the national school funding model

and its application by school principals, SGBs and departmental officials as participants to this study. It involves the knowledge that the SGBs have, their views on the national funding model and their understanding of school funding. Information gathering on funding was done through interviews, where the researcher interviewed school principals, SGBs and departmental officials. These participants shared their experiences and reasoning with the researcher. The epistemological position in this study is that knowledge is subjective. Furthermore, it is formed, handled and communicated by various participants differently. In the current study, a search for knowledge was conducted on various meanings and understandings of the participants attached to school funding.

4.2.2 Ontology

Ontology means considering personal experiences as necessary to what reality means for them (Terre Blanche, Durrheim & Painter, 2006). Huff (2009) defines ontology as how individuals are involved in the construction of the reality that they observe. In other words, ontology refers to assumptions about knowledge and the reality from which the researcher derives it. The ontological assumption concerns the diverse views and realities discovered by the participants being studied rather than the researcher's viewpoint. Ontology further concerns how we think and understand a phenomenon and the nature of its reality. In this study, understanding participants' reality helped explain the national school funding model and the challenges it brings to schools. The nature of reality is socially constructed because school principals and SGBs face the situation of how quality education can be advanced through the national school funding and the challenges the funding presents to them. The reality is the challenging situation in which school principals, SGBs and departmental officials find themselves regarding school funding. Ontology helped to explain what the national school funding model is or what it means to the beneficiaries of funding.

4.2.3 Methodology

Leedy and Ormrod (2010) define methodology as a systematic method of data collection, analysis and interpretation to understand the phenomenon. Furthermore, Rammapudi (2014) and Madziyire (2015) define methodology as a plan to find a deep understanding

of the phenomenon. This implies that methodology is scientific, planned and organised procedure applied to educational problems and questions. The methodology is concerned with what the research activities involve and what establishes achievement in the research process. The current study used the qualitative method to address the research problem and questions. According to Wyse (2011), qualitative research methods are used to get in-depth information about individuals' life experiences. The qualitative research methods helped the researcher to gather in-depth information on school funding to address the research problem through the participants' answers to the research questions. The reason for using the qualitative research method was that it provided the researcher with an opportunity to use various data collection methods in gathering data from school principals, SGBs and departmental officials regarding national school funding.

This study is grounded on the constructivist-interpretivist philosophical paradigm that discards objective knowledge and accepts subjective truth from the participants' viewpoints. Linchman (2014) contends that constructivism is a philosophical paradigm in which people construct and interpret phenomena through their life experiences concerning the knowledge of what they know to understand the reality of phenomena. This means that -within the constructivist paradigm- the researcher attempts to understand the participants' world by interacting with them. This allows the researcher to interpret the participants' thoughts, opinions and experiences in their natural context. The advantage of the constructivist paradigm is that it helps the researcher to understand and draw clear and reasonable conclusions that participants perceive the phenomenon differently (Katanga, 2016). As regards the current study, the constructivist paradigm helped the participants to construct knowledge about school funding. In this manner, the researcher and participants could construct reality and interpret it.

The interpretivist paradigm involves different perspectives of the reality of the phenomenon under study and does not believe in one objective reality (Flick, 2014). This implies that different perspectives of reality relate to a particular issue, depending on the participants' context. In the current study, the interpretivist paradigm assisted the researcher and the participants in interpreting their understanding of the knowledge they

had constructed concerning school funding. This suggests that the interpretive paradigm involves understanding the phenomenon through lived experiences and the context of the participants.

The constructivist-interpretivist view supports self-awareness, as the researcher also has his views on creating knowledge. Intrinsically, the researcher should analyse their assumptions by making them clearly understood, not only to himself but to others. The researcher avoided bias during the study. The constructivist-interpretivist view was the most suitable for the current study because it establishes a close relationship between the researcher and the participants. This close relationship helped the researcher generate meaning from the interview participants' data. They expressed their experiences and thoughts about improving quality education through the national school funding model in a rural South African context.

4.3 THEORETICAL PERSPECTIVES

Creswell (2003) states that a theoretical lens is used to direct a study and advance researchable questions. Qualitative researchers approach their studies from different theoretical perspectives. Mertens (2003), Morgan (2007) and, Teddlie and Tashakkori (2009) define a paradigm as philosophical issues together with the assumptions that accompany a particular worldview. Research shows numerous paradigms for the nature of knowledge as philosophical assumptions or worldviews, including positivism, interpretivism and pragmatism. In the present study, the researcher approached the phenomenon of funding for quality education in the South African context from an interpretivist paradigm. The interpretivist paradigm helped the researcher to discover the truth or untruths regarding epistemological assumptions for the study. Clow and James (2014) define interpretivism as a social phenomenon encompassing participants' interactions to create a theory. This implies that the researcher had an opportunity to ask the participants some questions during the investigation. The researcher also got the subjective experiences of creating the social world. It was established that the approaches used by school principals, SGBs and departmental officials to advance quality education through the national school funding model could be understood from the participants' subjective meanings, which cannot be isolated from their situations.

The purpose of the interpretivist paradigm is to establish an understanding between the researcher and the participants. McNabb (2010) asserts that the interpretivist paradigm has an element of a close relationship between the researchers and the participants involved. This implies that the researchers and the participants are inseparable from their research settings. The interpretive paradigm allows the participants to give personal descriptions of their situations and behaviours. In the current study, the researcher strived to view the world from the viewpoints of the school principals, SGBs and departmental officials. The interpretivist paradigm involves understanding and interpreting participants' knowledge, meanings, opinions, attitudes and experiences. Thus, the interpretive lens helped the researcher to understand, describe and interpret the meanings that participants attach to their understanding of how quality education can be advanced through the national funding model in rural South African schools. Interpretivists believe that participants cannot be understood outside their setting. This suggests that the interpretivist paradigm involves people's subjective experiences and the construction of their social world. Guided by this assumption, the researcher used interviews, observations and document analysis to examine the participants' behaviour and interact with them in their natural setting. Interpretivists uphold the view that a phenomenon should be studied as a whole and not isolated from its natural setting.

According to Maree (2012), the interpretivist paradigm is underpinned by the following five assumptions:

Human life can only be understood from within: Interpretivists believe that human life cannot be understood when the researcher is separated from the participants. Interpretivism involves people's subjective experiences and the construction of their social world. Guided by this assumption, the researcher in the current study used interviews, observations and document analysis to interact with school principals, SGBs and departmental officials in their natural setting. Furthermore, the researcher examined the participants' behaviour and interaction in their social contexts.

Social life is a distinctively human product: Interpretivists believe that reality is not objectively resolute but socially constructed. They uphold the view that a phenomenon should be studied as a whole and not isolated from its natural context. In the current study,

the researcher went to the research sites with no preconceived views to gain an in-depth understanding of the national funding model.

The human mind is the purposive source or origin of meaning: Interpretivists argue that knowledge is personal, subjective and unique. For that reason, they want to understand the meanings communicated by human beings to phenomena in their natural setting. Since knowledge is a social construct, the researcher used data collection strategies such as in-depth interviews, focus group interviews and observations to collect the primary data, assuming that the circumstances concerning the national funding model can only be understood from the participants' viewpoints.

The social world does not exist independently of human knowledge: Interpretivists contend that considering the world as outward and independent of the human mind is to disregard human subjectivity. In the current study, the researcher used interactive and non-interactive data collection strategies to understand the challenges schools in rural communities face in implementing the national funding model.

Human behaviour is affected by knowledge of the social world: Interpretivists assert that there are several truths about a phenomenon. They accept that reality, by its socially constructed nature, is characterised by time, space and context. Following this assumption, the researcher in the current study did not have any preconceived thoughts when undertaking the investigation. Instead, the researcher paid attention to the participants' views on funding, as provided through the national funding model.

4.4 RESEARCH APPROACH

A research approach refers to a plan for undertaking research that originates from wide-ranging assumptions that result in specific data collection procedures, analysis and interpretation (Creswell, 2014). The qualitative research approach was the most suitable for this study for answering the main research question. The qualitative research approach is defined in different ways. Maree (2010) defines qualitative research as an effort to gather rich descriptive data concerning a particular phenomenon in a definite context to foster an understanding of the study. On the other hand, Creswell (2009)

defines qualitative research as a method using which researchers discover and understand the meaning that people attach to a social problem.

Furthermore, Mack, Woodsong, Macqueen, Guest and Namey (2005) define qualitative research as scientific research that tries to realise a specific problem from people's viewpoints. What these definitions suggest is that qualitative research involves finding out what people think, how they feel or what they say they think and how they say they feel. Therefore, this research is subjective, as it involves thoughts and feelings. In the current study context, the qualitative approach was the most suitable for assisting the researcher in understanding the challenges that schools in rural communities face in implementing the national funding model to ensure quality education.

The qualitative approach allowed the researcher to discover, understand and present the participants' views. In addition, qualitative research allowed the researcher to identify issues from the participants' perspectives and understand the meanings and interpretations that participants attribute to behaviours and contexts. Therefore, human behaviour is incomplete if it does not consider the context. The researcher in qualitative research must be unbiased, unprejudiced, inquisitive, flexible and attentive to the expressions made by the participants. As a result, in the current study, participants' data and the analysed documents were collected directly from the participants. This was done to get detailed accounts that provide an in-depth understanding of participants' behaviour and context.

The qualitative research approach allowed the researcher to use interviews to collect data. In other words, it allowed the researcher to gather rich data from the participants through the interviews. The researcher's goal in conducting the current study was to avoid generalising a phenomenon but to seek an in-depth understanding of the challenges schools in rural communities faces in implementing the national funding model to ensure quality education. The qualitative approach allowed the researcher to be the critical research instrument, as he collected data using an interview protocol that he developed. During the investigation, the researcher met with the school principals and SGBs at the selected secondary schools and departmental officials at their offices. In qualitative

research, the researcher must concentrate on participants' meanings of the phenomenon and not what the literature recommends (Kumar, 2011; Creswell, 2013). Therefore, the qualitative approach accommodated the different voices of school principals, SGBs and departmental officials as they attached meaning to their experiences.

According to McMillan (2008), qualitative research has the following characteristics:

Natural setting: participants are studied in their natural locations, without external influence or limitations. Researchers are supposed to go where the action occurs. In the current study, the natural settings were schools and departmental offices. The phenomenon was the national funding model.

Direct data collection: researchers can collect data directly from the participants by gaining a complete understanding, as data would be close to them. They can directly interview each participant. The researcher gains the advantage of the closeness to the data, creating an opportunity for further probing during the interviews.

Rich narrative descriptions: the researchers assume that all data is important. Researchers write detailed notes that offer an in-depth understanding of behaviours and contexts.

Inductive analysis: data is collected and created inductively. Conclusions are drawn from occasions to create generalisations. Synthesis happens when the researcher starts interviewing and observing participants to draw inferences.

Emergent research design: the study's design can change as the investigation occurs. As the interviews proceed, things can change to become clear that they can be implemented theoretically and not practically. This can lead to a change in the design of structured questions organised before the researcher goes to the research site.

4.5 RESEARCH DESIGN

A case study design was chosen for the current study, which is consistent with the research purpose. The case study design investigates a phenomenon in its real-life situation. Creswell (2014) defines it as a comprehensive investigation of specific

structures constructed on extensive data collection. Yin (2009) defines it as a plan of prearranged questions used to investigate the depth of the phenomenon in its context. A case study is appropriate to study poorly known circumstances (Leedy & Omrod, 2005). Design involves several decisions regarding the research topic, aim, and methodology (Babbie, 2009). In the current study, the selection of a case study follows the consideration of the study's research question, the research methodology, the researcher's experience, sample size, the delimitation factors, and time and budget allocation. The case study design outlined the investigation procedures, including the participants, the settings and the period data. This design indicated the overall strategy in which the research was organised and the data collection methods used. The selected design also enabled the researcher to compare the data collected from different participants to strengthen the research findings. In line with the primary aim and research question, qualitative research was the most suitable for this study. This is because it involves studying participants in their natural settings, represents participants' views and perceptions, covers contextual conditions, describes real-life events and endeavours to collect, interpret and present data from different sources.

Case study design responds to specific research questions using various forms of evidence from the case setting (Gillham, 2000). McMillan and Schumacher (2001) argue that case study design investigates a case over time in detail by using multiple sources of data that originate from each setting. In this study, the case study design helped the researcher to gather responses to the research questions. Gravetter and Forzano (2009) concur that the case study design can be used to study a comparatively small group of people or an institution to find a description of the group or the institution. Henning, Van Rensburg and Smit (2004) stress that the purpose of case study design is to discover forms and relations that motivate the research, rather than just describing the case or cases. The current study's case study design was meant to improve the knowledge and understanding of school funding. Furthermore, the cases of six school principals, six SGBs and three departmental officials were chosen to examine how quality education can be advanced through the national funding model in rural South African schools. The national funding model is, thus, the phenomenon of interest for the current study. This design provided a detailed description of the national funding model, which could assist

school principals, SGBs and departmental officials in pursuing quality education delivery in schools.

4.6 RESEARCH METHODOLOGY

Research methodologies assist researchers in implementing their chosen research designs. Research methods are defined in the literature as involving the selection of the population for data collection purposes, techniques used to draw samples from the identified population and the data collection strategies (Mouton, 2003; Creswell, 2014). The qualitative research methodology was chosen to apply the case study design in the current study and achieve credible and trustworthy results. Qualitative research methodology involves the steps to be followed in the research process, the procedure to be embarked upon, and the tools used by the researcher. The reason for the choice of this methodology was based on the nature of the research question; that is, relating to the examination of how the national school funding model could be used to ensure quality education in rural South African schools. Four sub-sections discuss the population from which the participants were selected. These are sampling strategies, data collection strategies and instruments.

4.6.1 Sampling Strategy

A sampling strategy for a study is essential, as the sample guides a researcher in determining the number of participants to be engaged. This is because it is not always possible to include everyone in one's study. Sampling allows researchers to use their experience or previous research findings to gain units of analysis so that the sample they select may be regarded as representative of the appropriate population (Welman & Kruger, 2000). A purposive sampling strategy was applied to select both the schools and participants. A purposive sampling strategy is used to select knowledgeable individuals about the examined issue (McMillan & Schumacher, 2006). In the current study, the issue being examined was funding for quality education. This strategy is commonly used in qualitative research to identify and choose information-rich cases (Patton, 2002). However, Patton (2002) argues that the aim of purposive sampling is not to randomly choose cases from a population to generate a sample with the intent of making

generalisations; instead, it focuses on specific features of a population of interest, which will enable the study to answer the research question. In the current study, the researcher chose purposive sampling to help with the following aspects: how to find participants, where to find participants, how many participants were required, how to assess the credibility and trustworthiness of the participants and how to find the suitable participants for each research question.

While the case study design is valued in qualitative studies, recognising, and choosing individuals or groups that are knowledgeable about the phenomenon of interest is at the core of qualitative research (Creswell & Plano Clark, 2011). An appropriate sampling strategy in qualitative research assists in understanding a phenomenon in its natural setting (Welman and Kruger, 2000). Therefore, the appropriate sampling criterion must be applied in selecting the appropriate sampling strategy (Creswell & Plano Clark, 2011). Morse and Niehaus (2009) contend that sampling strategies must improve the efficiency and validity of the research, irrespective of the nature of the research (that is, whether it is qualitative or quantitative). This implies that the sampling strategy plays a vital role in selecting appropriate participants, as they possess the required knowledge and experience of the data. In qualitative research, the investigation relies on detailed information; the number of participants does not determine the significance of the research.

4.6.2 Research Site

The research sites for this study were six purposively selected schools, a circuit office, a district office and a provincial office in the Limpopo Department of Education. The schools were under the Capricorn North section of the Limpopo Province. These schools are rural public schools; they fall under the *no fee-paying school* category. A no-fee school is a school that does not levy school fees, as many learners' parents are poor and cannot afford school fees. Such a school is allocated a *Section 21* status. Section 21 schools are allocated additional functions in Section 21 of the South African Schools Act No 84 of 1996 (RSA, 1996). All the selected schools for study are managed by one circuit office located in the city of Polokwane. All public schools in the Republic of South Africa are categorised according to quintiles, classifying them into no fee-paying and *fee-paying*

schools. The six *no-fee schools* selected for participation in this study all had the Section 21 status. These schools are allocated additional functions in Section 21 of the SASA (RSA, 1996b). The DBE uses the quintiles to designate the poverty status of each school community. All parents of learners in no fee-paying schools do not pay school fees but receive funding from the government. The researcher conducted the field study for three months by visiting the research sites per the scheduled dates and times.

4.6.3 Selecting the Participants

The participants for the current study were six school principals, six SGB finance committees, one Circuit Deputy Manager: Governance, one District Chief Education Specialist: Governance and one Deputy Chief Education Specialist responsible for school funding allocations. The SGB members selected from each of the six schools consisted of a chairperson, vice-chairperson, treasurer, finance officer and two additional members. The total number of participants at each school was seven: the school principal and six SGB members. There were several reasons for the selection of the participants. The reasons include the following:

- 4.6.3.1 *School principals* were included because of their leadership role in ensuring the quality of teaching and learning.
- 4.6.3.2 *SGB chairpersons* play an essential role in authorising payments.
- 4.6.3.3 *SGB vice-chairpersons* are bank signatories.
- 4.6.3.4 *SGB treasurers* monitor all the financial affairs of the school.
- 4.6.3.5 *Finance officers* are responsible for the daily financial administration.
- 4.6.3.6 *Finance Committee members* serve on the committee based on their financial expertise. *Education department officials* are responsible for school funding.

The selected sample was small. This is because researchers such as Yin (2009) believe that a small sample is the most appropriate when the purpose of qualitative research is more focused. These researchers add that selecting a small sample allows the researcher to collect rich data from the participants (Yin, 2014; Gentles, Charles, Ploeg & McKibbon,

2015). This suggests that in a qualitative study, it is generally advisable to use a small and rich sample to allow an in-depth study of the phenomenon. For this reason, the researcher chose six school principals, six SGB finance committees and three departmental officials.

4.6.4 Data Gathering Process

Qualitative researchers collect data in their natural settings using interviews and record human behaviours in interactions (Durrheim, Painter & Terre Blanch, 2007). The current study collected the data through interviews, observations and document analysis. Using more than one data collection strategy was used for triangulation to enhance the quality of the results. The researcher visited the sampled schools and departmental offices to interview the school principals, SGB finance committees and departmental officials after permission was granted. The data gathering methods are discussed in greater detail in the following sections.

4.6.4.1 Interviews

Two interviews were used: in-depth individual interviews and focus group interviews. These interviews were conducted during school and departmental visits after receiving permission from the participants. Interviews were used as the primary source of data. This data collection strategy helped the researcher understand the participants' life experiences and settings. Furthermore, the interviews helped the researcher collect data on how participants attach meaning to their setting. Therefore, the interviews elicited information from the participants to obtain rich data about national school funding. The rich data collected was valuable, as the researcher gained information on participants' life experiences and behaviours. In-depth individual interviews were conducted with school principals and departmental officials. The in-depth interviews were also valuable, as the researcher could obtain in-depth information from the participants.

De Vos (2005) defines in-depth interviews as face-to-face interactions between the researcher and the participants. In-depth interviews aim to understand the participants'

life experiences or to set, as communicated in their own words. Separate focus group interviews were conducted with the SGB finance committees of the six selected secondary schools. Each focus group comprised the chairperson, the vice-chairperson, the treasurer, the finance officer and two additional members. The focus group interviews provided the researcher with in-depth insights into the experiences and perceptions of the SGB members. Creswell (2008) considers focus group interviews necessary as they bring together thoughtful opinions from several individuals.

In the current study, the interviews helped in gathering rich information. This information enhanced the researcher's understanding of the participants' creation of knowledge and social reality (Maree, 2012). For this reason, interviews are the most appropriate instruments for a qualitative study of this nature, as they are known to be flexible for gathering data using recorded channels such as verbal, non-verbal, heard and spoken communication (Cohen, Manion & Morrison, 2011). The interviews were facilitated through an interview guide or schedule, a list of questions to be answered. The participants' responses were recorded during the interviews to generate meaningful data. The interview questions were created from the main question and sub-questions of the study, as it is a standard practice advocated in the literature (Cohen et al. 2011). The use of semi-structured and open-ended interview questions facilitated probing of questions that the participants did not answer.

McMillan and Schumacher (2014) assert that one of the benefits of interviews is that they provide the participants with an opportunity to express their views freely. This is because of the open-ended responses, which are not limited to fixed categories. Semi-structured interviews also guarantee data comparability. Using semi-structured interviews, the researcher could analyse, interpret and compare the data gathered. Interviews were conducted after school hours to avoid disruptions in the daily school programmes. The researcher also ensured that participants did not diverge from the interview questions. The participants' responses were audio-recorded, and field notes were written to support the recordings. Interview schedules as data collection instruments were used to collect interview data (**Annexures I & J**). Annexures I and J were used to collect in-depth

interview data from school principals and departmental officials, respectively, while **(Annexures K)** was used to collect focus group interview data from SGB members.

4.6.4.2 Observations

The non-participant observation was also made, during which notes were taken. This was the second data collection strategy used. The researcher was a non-participant observer during the observation. Non-participant observation implies that the researcher notes what is said or done without directly interacting with the participants. A non-participant observer observes without taking an active role in the natural setting (Bryman, Bell, Hirschsohn, Dos Santos, Du Toit, Masenge, Van Aardt & Wagner, 2014). The physical condition of the school formed part of the aspects observed. Other aspects included availability, maintenance and renovation of all school buildings, learning support materials, and equipment used for teaching and learning. The non-participant observation allowed the researcher to conduct physical verification, aiming to confirm the participants' responses and observe unpredicted data sources as they happened. An observation schedule was used as a data collection instrument to capture and record observation data **(Annexure L)**.

4.6.4.3 Analysis of documents

Documents analysis was used as the third data collection strategy to supplement data obtained through interviews and observations. Henning, Van Rensburg and Smit (2004) argue that document analysis assists with data left out during the interviews. It is against this background that document analysis as a strategy was used to gather supplementary information that the researcher could not get during the interview and observation gathering processes through the documents analysis guide **(Annexure M)**. Based on the research aim and question, the researcher carefully studied and analysed the documents with relevant information, such as the School Development Plan, School Improvement Plan, the school budget, school policies on finance, procurement, fundraising, assets and maintenance, Learning and Teaching Support Material and registers. Permission to make copies of these documents to study later was granted. The copies enabled the researcher to read and analyse them at his convenience.

4.7 DATA ANALYSIS AND INTERPRETATION

The data was analysed thematically. Braun and Clarke (2006) define thematic analysis as a technique for classifying, analysing and writing themes, describing data obtained in a minimal and relevant form. This type of data analysis presents the form and meaning of the data collected (De Vos, Strydom, Fouche & Delpont, 2003). It describes the significant themes used to define the phenomenon under study. Thematic analysis was used to show the most important patterns of meanings present in the data. It facilitated knowledge gathering of the meaning resulting from the phenomenon under study and offered the foundation for creating effective models of human thoughts, feelings and behaviours. Significantly, thematic analysis regards the existence of themes and the depth of analysis as necessary. Data analysis formed an inseparable relationship with the collected data. The researcher presented the interview findings by writing down each question, followed by the responses from the research participants. Comparisons were made and discussed. The generated data was organised. Relationships and patterns among the generated data were scrutinised. Data was coded and categorised into different themes. The researcher categorised similar responses together under the research question or theme. Contrasting responses also played a significant role in analysing and interpreting the data. Responses were analysed and integrated with the theoretical framework and literature review chapters. The themes sought to answer the main research questions. To analyse non-participant observations, the researcher studied the notes written at the research sites and presented the findings. The data collected through document analysis was used to formulate the findings and draw conclusions per the research objectives.

The six steps of thematic analysis suggested by Braun & Clarke (2006) were followed. During the first step, the researcher read and re-read the transcriptions, and field notes, listened to the audio recordings to familiarise himself with the data, and subsequently wrote down the essential ideas. During the second step, the researcher used coding schemes to code the selected data to streamline relationships between the data. In the third step, the researcher explored the patterns within the data to identify the themes across the selected data sets. In the fourth step, the researcher reviewed the identified

themes to ensure they matched the codes. In the fifth step, the researcher named and defined each theme, and in the final step, the researcher reported the findings.

According to McMillan and Schumacher (2006), data analysis is an organised method of coding, categorising and interpreting data to describe the phenomenon under study, answering the research question. Data organisation, analysis and interpretation, were directed by the participants' leading research questions and interview responses. We used different colours to identify the codes to organise the research findings easily. Qualitative data analysis establishes how participants originate the meaning of a definite phenomenon through the analysis of their knowledge, understanding, experiences, observations, feelings, attitudes and values to describe the creation of a phenomenon (Creswell, 2014).

4.8 QUALITY OF THE RESEARCH

4.8.1 Trustworthiness of Qualitative Data

Trustworthiness determines whether the research findings are valid and reliable from the researcher's, the participants', and the readers' viewpoints (Creswell, 2009). In pursuing trustworthiness, the following concepts relating to the study will be explained: credibility, transferability, dependability and conformability.

4.8.1.1 Credibility

Regarding credibility, the researcher ensured that correct data was presented (Shenton, 2004). McMillan and Schumacher (2010) describe credibility as the extent to which the research findings are truthful, precise, honest and realistic. This suggests that credibility establishes whether the research findings received from the participants and the data interpretation are correct. The researcher used multiple data-gathering instruments to achieve credibility in the study. The purpose of using multiple instruments was to cross-check the accuracy and consistency of the collected data. Data collected was cross-checked to establish similarities and differences. Cohen, Manion and Morrison (2013) define triangulation as using multiple data collection strategies to study human behaviour. In the current study, the credibility of the qualitative data was ensured through

triangulation, selection of context and participants and the data gathering instruments. The researcher triangulated data from the participants: school principals, SGBs and departmental officials. Triangulation is a strategy to ensure the credibility of research findings from data collected using different strategies and instruments. This was achieved by studying and comparing data acquired from the interviews, non-participant observation and document analysis. Triangulation helped synthesise data, validate evidence emerging from the data, and reduce bias.

4.8.1.2 Transferability

Transferability allows the reader to link the findings presented in one study and those of others. Shenton (2004) asserts that findings in qualitative research can be appropriate to other contexts and participants. In support of Shenton (2004), Morrow (2005) defines transferability as the degree to which the readers can generalise the study findings to their context and addresses the fundamental issues of how much the researchers can claim a general application of their theory. This implies that research findings enabled the researcher to conclude how this study could be appropriate in other research contexts. The researcher assured transferability by creating rich data descriptions and purposively sampling participants. Purposive sampling as a strategy to select individuals who are knowledgeable about the phenomenon under study also ensured the trustworthiness of this study. Finally, the researcher obtained detailed descriptions of the research done during interviews through an audio-voice recorder.

4.8.1.3 Dependability

Dependability is used to ensure that other researchers can repeat the collected data. If similar data collection strategies are used on the same participants under similar conditions, similar findings will be obtained. Dependability is another measure of qualitative data trustworthiness (Ary, Jacobs, Razavieh & Sorensen, 2010; Cohen, Manion & Morrison, 2011). Dependability is the degree to which research findings can be repeated in similar contexts with the same participants (Bitsch, 2005). The present study ensured dependability through triangulation of data collection strategies and instruments. The researcher kept the data collection instruments and the collected data safe.

Furthermore, the recording and coding data were done by the researcher himself to ensure the dependability of the findings. Recording and coding were done; these produced the same themes, signifying a high dependability degree of the findings.

4.8.1.4 Conformability

Conformability is used to maintain objectivity and the degree to which findings are formed by the participants, not the researcher (Koch, 2006). This suggests that conformability refers to the degree to which other researchers could confirm the findings. It determines whether the measures followed by the researcher to validate the findings come from the data and are not the researcher's inclination. To ensure conformability, the researcher conducted a pilot study to ensure the participants could clearly understand the research questions. The pilot study helped the researcher check whether the research questions were straightforward. It allowed the researcher to review the questions where necessary. During the interviews, the researcher allowed participants enough time to answer the questions sufficiently. For this purpose, the researcher strived to establish good relations with the participants so that they could give rich data. Prolonged data collection engagements took place so that the researcher could do follow-ups to establish patterns in the findings. An audio recorder was used during interviews, and the data collected were transcribed verbatim. Finally, participants were allowed to read the transcripts and make corrections to the collected data, if necessary.

4.8.2 Consistency

The researcher was guided by the research questions and objectives to sustain consistency in data collection and analysis (Maruster & Gijzenberg, 2013). The researcher adopted in-depth data collection strategies and various phases of data analysis (Creswell, 2013; Yin, 2014). The data was scrutinised for consistency through the relationship of the participants' explanations (Glaser & Strauss, 2012). Baxter and Jack (2009) assert that consistency of findings can be ensured through relationships in the emerging codes, categories and themes during data analysis. Consistency was also ensured by using the case study approach (Yin, 2009). This methodology assisted the

researcher in linking the research purpose, questions and methods as an interconnected whole (Creswell, 2013).

4.8.3 Relevance

The researcher carefully chose appropriate data for the phenomenon, in line with the research questions. Triangulating the data collection methods was used to fortify the study's relevance (De Vos, Strydom, Fouche & Delport, 2012; Creswell, 2013). The study's relevance was ensured when the research questions were answered appropriately. The researcher was assisted by the promoters' remarks and advice, member checking and the assistance of a qualified editor and proofreader (Brooks & Normore, 2015). Relevance was attained through the appropriate development of themes during data analysis (Ng & Hase, 2008; Long, 2012).

4.9 ETHICAL CONSIDERATIONS

Ethical principles must be considered before conducting the research, at the beginning of the research, during data collection and analysis, and when reporting the findings (Cooper & Schindler, 2014). Ethics allow the researcher to ensure that all participants participate voluntarily and remain unharmed throughout the research process (Leedy & Ormrod, 2005). The ethical principles adhered to in the current study are discussed under the following sub-headings:

4.9.1 Harm or Risk and Mitigation

Researchers must protect their participants, build a good relationship with them and promote the integrity of the research. Ethical principles are considerations throughout the investigation process (Wagner, Kawulich & Garner, 2012). These considerations protect participants against any physical, emotional or psychological harm during the investigation. Leedy and Ormrod (2015) recommend that each time human beings are the focus of the investigation, researchers must reflect on the ethical consequences of what they intend to do. The researcher ensured that the participants were not subjected to any situation that could lead to physical, emotional or psychological harm. The researcher also ensured that the protection of the participants' rights, dignity, well-being, and safety superseded his interests and those of the investigation. Furthermore, the

researcher avoided any stress or harm to the participants. This is consistent with Fouka and Mantzorou (2011), who insist that the researcher must consider all possible investigation consequences and balance the risks with the comparable benefits.

4.9.2 Voluntary Participation

During his visits to the research sites, the researcher informed the research participants about the aim of the study and that their participation in the study was voluntary, with no compensation for participation. He also informed the participants that they could withdraw their participation at any time (**Annexure E**). Furthermore, participants were provided with detailed information about their role, the research process, the data collection instruments, and how the results would be used. However, the researcher stressed that the participants' involvement was as crucial as the study's results.

4.9.3 Informed Consent

The participants were asked to complete and sign the informed consent forms to participate in the study voluntarily. The consent forms outlined how the investigation would be carried out and the rights of participants. The participants gave the researcher consent to interview them, use a voice recorder to record the data, be observed, and produce the required documents. The consent forms were signed before the actual interview took place. The consent forms for school principals, SGBs and departmental officials are attached as **Annexures F, G & H**, respectively.

4.9.4 Confidentiality and Anonymity

Confidentiality guarantees the participant's privacy, as it ensures that the identity of the participants will not be revealed in the study. Anonymity also ensures that the participant's identity will remain unidentified throughout the study. Pseudonyms are used in place of participants' actual names. The researcher also promised that the information provided would be kept strictly confidential to ensure that the participants' dignity is protected and their names are not mentioned anywhere in the study. The researcher ensured that the privacy of the participants was always respected. As a result, the researcher did not use the participants' names for the duration of the study. The participants and research sites

will remain anonymous, and pseudonyms were used to refer to the participants and research sites. According to Berg (2009), the participants must remain anonymous, and their well-being should not be compromised. Gibbs (2010) concludes that confidentiality means that participants and the data they provide should never be associated. Protecting participants' confidentiality also necessitates researchers not to reveal personal features that could help some people to speculate the identities of the research participants.

Furthermore, participants were assured that the information collected and their responses would not be used against them. Participants were also assured that the schools and participants' names would remain anonymous during the investigation and afterwards. In addition, in-depth and focus group interviews were conducted in designated rooms at the schools. The researcher ensured confidentiality by keeping the voice recorder and recordings secured in safe custody. The researcher also ensured that unauthorised people could not access the voice recorder and data records. Confidentiality is difficult in focus groups, so the researcher requested the participants to treat all the interview information confidentially. To help in this regard, schools were named **A, B, C, D, E** and **F**, whilst departmental offices were named **A, B** and **C**. Furthermore, school principals were named **A, B, C, D, E** and **F**; SGBs were named **A, B, C, D, E** and **F**, while Departmental officials as **A, B** and **C**.

4.9.5 Permission to Conduct Research

The researcher applied for and received ethical clearance (**Annexure A**) from the University of South Africa's College of Education Ethics Committee to conduct the study. The researcher also applied (**Annexure B**) and received permission (**Annexure C**) from the Limpopo Department of Education to research the six selected public secondary schools, circuit office, district office and provincial office. The researcher also received permission (**Annexure D**) from the Director (DD) of Capricorn North District, Limpopo Province. The researcher also met with the Circuit Manager (CM), who oversees the selected six secondary schools, to inform her about the planned investigation. The researcher communicated with the school principals of the selected schools and had meetings with the selected SGBs to inform them about the aim of the study and the

processes to be followed during the study. After that, dates were arranged for conducting the interviews, observations and document analysis. As three departmental officials were also part of the investigation, the researcher visited their offices to outline the aim of the study and the investigation process.

4.10 SUMMARY

This chapter covered philosophical assumptions, theoretical perspectives, research approach, research design and methodology. The research methodology includes sampling, research site and selection of participants. A case study research design was chosen as the most suitable design to address the research problem. The basis for selecting qualitative data collection methods, such as interviews, observations and document analysis, was explained. Lastly, this chapter presented the data collection procedures, quality of the research and ethical considerations. The next chapter presents the data collected and an analysis of the data.

CHAPTER FIVE

DATA PRESENTATION AND ANALYSIS OF RESEARCH FINDINGS

5.1 INTRODUCTION

The previous chapter discussed the philosophical assumptions, theoretical perspectives, research approach, design and methodology, sampling, the research site, participant selection, data collection methods and document analysis. It also covered the quality of the research and ethical considerations. This chapter presents data and analyses the findings on how quality education can be advanced through the national funding model in rural South African schools. The presentation of research findings is categorised according to the themes and sub-themes that express the phenomenon under study. Verbatim quotations of the research participants are used to support the findings and the interpretation thereof. Data is analysed manually, according to the themes outlined below, aligned to the research objectives mentioned in Chapter 1, which are:

- To investigate how the national funding model is implemented to advance quality education in rural public schools.
- To identify the challenges schools in rural communities face in implementing the national funding model to ensure quality education.
- To investigate how rural school principals and SGBs address the challenges emerging from the management of state-allocated funding to ensure quality education.
- To establish how educational resources are used to advance quality education in rural public schools.
- To develop a funding model to address challenges encountered in advancing quality education through the national school funding in rural South African schools.

5.2 PROFILES OF THE SCHOOLS THAT WERE INVOLVED IN THE STUDY

The data from the six schools was gathered through a template handed to the school principals to complete. The template covered the following aspects: quintile ranking, learner enrolment, post establishment, promotional posts, performance over the last five years, departments DHs are responsible for, learner discipline, enrichment programmes, extra-mural activities offered, achievements and parental involvement. The schools that participated in this study were no-fee Quintile 2 schools. They were in rural areas and served rural communities. The schools had been performing well in terms of Grade 12 results. In other words, the schools were trying their best in learner performance and discipline, despite the social ills prevalent in the communities they were serving.

Generally, the main disciplinary challenges encountered were bullying, gangsterism, substance abuse, late coming, absenteeism, failure to complete schoolwork and gambling. These violations are dealt with in the schools' code of conduct. One major challenge these schools faced was minimal parental involvement in school activities. The common challenges that affected the schools were high crime rates, teenage pregnancy, substance abuse, poverty and child-headed families. Parents relied mainly on social grants for their daily livelihoods. Due to the high crime levels, there were many school burglaries. Regarding extra-mural activities, some schools were doing well, as they had certificates and trophies in their offices for participating in various codes, such as softball, netball, boys' and girls' soccer, volleyball, athletics, and cultural activities, debate, music, rugby and dance. Some schools even reached the provincial level in these activities.

5.2.1 Profile of School A

School A was under Quintile 2 and was in a deeply rural area. It had a learner enrolment of 181 and 7 teachers. The staff comprised the principal and 6 Post Level (PL) 1 teacher. Regarding the post establishment of teachers, the school qualified for the HOD post, but since the post had not been filled, a substitute PL 1 teacher had been temporarily appointed. The school was established in 2019 and was led by a very energetic, visionary lady principal who is highly ambitious in everything she does. There was a learning culture prevailing at this school. As one entered the school, one could see that all the classes

were full, teachers teaching and learners learning. The staff strived to ensure an improvement in their Grade 12 results. The 2019 and 2020 pass rates were 53.8% and 88.5%, respectively—the principal led by example, as she also taught Grade 12 and produced good results for Geography. Learner discipline was characterised by a few incidents of verbal abuse and gambling. Enrichment classes were held on weekends and school holidays for grade 12 learners. The staff and governance of the school had introduced softball as a sporting code to enable learners to explore new sporting activities. Even though the principal and SGB tried as much as possible to get the school where they wanted it to be, it was still a new school, and parental involvement was minimal.

5.2.2 Profile of School B

This Quintile 2 rural school had 505 learners and 17 teachers. The post establishment consisted of a principal, deputy principal and 2 HODs and 13 PL 1 teachers. The 2 HODs were responsible for the Languages and Natural Sciences departments. The principal had co-opted three senior teachers to assist in the commerce, humanities and human resources management departments. Learner performance in Grade 12 was unsatisfactory for the previous three years, as they had achieved much below their target of 90%. In 2018, 2019 and 2020, the Grade 12 pass rates were 62%, 72% and 55%, respectively. The principal, who had just been newly appointed after being promoted to deputy principal, indicated that some contributory factors were a shortage of teachers, especially for subjects such as Mathematics and Physical Sciences. Despite the challenges, they tried to outsource teachers in those subjects to help teach their Grade 10, 11 and 12 learners during the weekends and school holidays. Learners were involved in soccer, netball, debate, and drama. The learners' parents showed little interest in the school activities. The community was impoverished, and both parents and learners abused drugs.

5.2.3 Profile of School C

This school was a no-fee school, classified as a Quintile 2. It was in a rural community where the parents could not afford to pay school fees for their children. Learner enrolment

was 137, primarily affected by a secondary school in the same locality approximately 2 kilometres away. The parents preferred taking their children to the neighbouring secondary school, despite making all the efforts the new school made to produce good results. However, the neighbouring school prided itself in good learner achievement, as it had obtained a 100% Grade 12 pass rate in 2020. It had achieved the 1st position within the circuit and the entire Capricorn North District. The school had improved its Grade 12 pass rate from 15.9% in 2018, 73.6% in 2019, to 100% in 2020. The Moletji Tribal Authority awarded the school an achievement certificate for the most improved school in their region.

The school had five (5) teachers, including the principal. Although they were few, the principal was the only one on a promotional post, and she used the other staff members to assist her in executing her management responsibilities. The other four (4) teachers were on PL 1. One teacher, who was a senior teacher, had been co-opted to act as HOD. Regarding learner discipline, the school experienced some bullying, drug use, teenage pregnancy, failure to complete schoolwork, and contravening the learners' code of conduct. Some parents did not see anything wrong with a child being pregnant at 16. Ten (10) pregnancies had been recorded in the previous three years. When parents were called to the school, they did not help discipline the children but instead regarded the school as a place where they could be helped to discipline their children. Enrichment programmes were held in all Grade 12 subjects, except Life Orientation. Programmes were conducted on Saturdays and during school holidays. On each Saturday, two subjects were taught for three hours. The extra-mural activities were netball, soccer and women's cultural dance (*Mapadi*). Most learners were child-heads. Social grants were the primary source of income in the community.

5.2.4 Profile of School D

The school was situated in a rural area characterised by high poverty. It was isolated from the community as it was built in the bush. It was classified as a no-fee paying school, falling under the Quintile 2 category. Learner enrolment was 1054. The post establishment had 31 posts with a principal, two deputy principals and 4 HODs and 24

PL 1 teachers. Amongst the promotional posts, one (1) deputy principal post and 2 HODs posts were vacant. Some of the teachers had been acting on roles. The two (2) appointed HODs and two (2) acting HODs were responsible for the Languages, Natural Sciences, Social Sciences and Commerce departments. The school also catered for learners from neighbouring communities, as there was scholar transport. The school had a very dedicated male principal with a dedicated staff. The staff worked beyond the prescribed regular working hours and made sure that they offered additional academic support through weekend and holiday classes. In the previous three years, 2018, 2019 and 2020, the Grade 12 achievement was 81,4%, 86,0% and 77,8%, respectively. Learner discipline was characterised by bullying, substance abuse, possessing dangerous weapons and gangsterism. Teenage pregnancy was high amongst girl learners from Grade 9 to 12. Furthermore, crime was rife in the community and led to burglaries in the school. The extra-mural activities offered were boys' soccer, girls' soccer and netball. In 2019, the school achieved sports honours and a trophy for participating in a provincial soccer competition.

5.2.5 Profile of School E

School E was in a rural area and was categorised as a Quintile 2 no-fee paying school. It had an enrolment of 457 learners with 14 teachers. The post establishment consisted of the principal, 2 HODs and 11 PL 1 teachers. One HOD post had not been filled, and the other HOD appointed was responsible for Languages. The school prided itself in good results and had received several trophies for its Grade 12 results over several years. The school had topped other schools in the circuit on five occasions, obtaining 90% in the Capricorn District and 100% in Limpopo in its Grade 12 results. The teachers were very committed, and for them, quality education starts in Grade 8. They offered enrichment programmes for Grades 8 and 9 Mathematics in the morning and afternoon. Grades 10 to 12 learners attended extra lessons in all the subjects in the mornings, afternoons, Saturdays, and school holidays. They believed that to achieve the best, they needed to work hard. They had adopted an attitude of going the extra mile to complete the curriculum on time and still have sufficient time for revision. Teachers also involved

learners in sports, such as soccer, netball, volleyball, and athletics. The school, like other schools, had a problem with crime, teenage pregnancy and substance abuse.

5.2.6 Profile of School F

The school was situated in a rural area which is highly developed in terms of infrastructure. Most of the community's people were educated and interested in the school's affairs. The school was classified under Quintile 2, which made it a no-fee school. It had an enrolment of 1700 learners, with 52 teachers. The post establishment consisted of a principal, two (2) deputy principals, 7 HODs and 42 PL 1 teacher. The acting principal was one of the deputy principals, as the principal had been expelled. The acting principal was a woman who was knowledgeable about management issues but seemed demoralised and unmotivated due to the instability at the school. She was not getting the necessary co-operation from some members of staff and the SGB. She even thinks of leaving the school.

The 7 HODs were responsible for the following departments: Sepedi, English, Mathematics, Natural Sciences, Social Sciences, Commerce, Life Sciences and Agricultural Sciences. The school had an outstanding track record for learner performance in general, particularly the Grade 12 results. Over several years, the performance had achieved between 95% and 100% pass rates. For 2018, 2019 and 2020, the achievement was 83.9%, 83.5% and 79.6%, respectively. Although the results seemed satisfactory, the learners had bullying and drug abuse problems. Enrichment classes were offered in all Grade 12 subjects in the mornings, afternoons, Saturdays and holidays. Learners participated and showed a keen interest in such extra-mural activities as rugby, soccer, netball, debate and music. When one went into the principal's office, one would see many trophies displayed, achieved through music and debate participation. The school also boasted teachers who were very good at music, and the school was well-known for its good music choirs. The acting principal said cooperation and teamwork amongst stakeholders were key to the success of every institution. One of the major challenges the school faces is the high crime rate.

5.3 PROFILES OF THE DEPARTMENTAL OFFICES THAT WERE PART OF THE STUDY

Three departmental offices in Limpopo province, namely, the Circuit Office, the District Office and the Provincial Office, took part in this study. The circuit office consists of 15 primary and seven (7) secondary schools. These 22 public schools are all no-fee schools falling under Quintile 2. The Grade 12 pass rates in 2018, 2019 and 2020 were 71.8%, 79.4% and 74.8%, respectively. The circuit office organogram comprises the acting circuit manager, acting deputy governance manager, five (5) support staff personnel responsible for Human Resources Management, Records Management, Physical Resources Management, National Schools Nutrition Programme (NSNP) and a driver. The District Office is made up of 16 Circuit Offices. It covers 267 primary schools and 146 secondary schools, which makes a total of 423 public schools. The spread of public schools in terms of the Quintile ranking was 123 Quintile 1; 266 Quintile 2; 33 Quintile 3, and 1 Quintile 4. There was no Quintile 5 school in this district. The Grade 12 district pass rate for 2018, 2019 and 2020 was 63.5%, 68.9% and 64.3%, respectively. The section responsible for school funding had 1 Chief Education Specialist (CES): Governance, three vacant Deputy Chief Education Specialists (DCES) posts and one administrative officer. At the provincial office, the Norms and Standards Unit is responsible for school funding in 10 Districts with Quintile rankings from 1 to 5. In Limpopo Province, the overall Grade 12 pass rate in 2018, 2019 and 2020 was 70.6%, 73.2% and 68.2%, respectively. The Norms and Standards Unit was supposed to have five (5) appointed officials: 1 CES, 3 DCES and an administrative officer. However, the positions had not been filled, as only one DCES was doing the work of 5 DCEs, as the Limpopo PED had not filled the vacancies.

5.4 RESEARCH PARTICIPANTS' PSEUDONYMS

This chapter presents, analyses and interprets the data from all the participants. Data collection strategies used to triangulate data were non-participant observations, interviews and document analysis. Triangulation assisted in ensuring data richness and trustworthiness. The analysis and interpretation of the presented data try to address the research problem according to the main research questions. The participants selected were six school principals, six SGB finance committees, one Circuit Deputy Manager:

Governance, one District Chief Education Specialist: Governance, and one Provincial Deputy Chief Education Specialist in charge of school funding allocations. The SGB finance committee members chosen from each school comprised the chairperson, vice-chairperson, treasurer, finance officer and two additional members. As indicated in Table 5, participants' pseudonyms were used to protect their identities.

Table 5.1: Participation Pseudonyms

SCHOOL A	
Principal	Principal A
Chairperson	Chairperson A
Vice-Chairperson	Vice Chairperson A
Treasurer	Treasurer A
Finance Officer	Finance Officer A
Additional Member	Additional Member A
SCHOOL B	
Principal	Principal B
Chairperson	Chairperson B
Vice-Chairperson	Vice Chairperson B
Treasurer	Treasurer B
Finance Officer	Finance Officer B
Additional Member	Additional Member B
SCHOOL C	
Principal	Principal C
Chairperson	Chairperson C
Vice-Chairperson	Vice Chairperson C
Treasurer	Treasurer C
Finance Officer	Finance Officer C
SCHOOL D	
Principal	Principal D
Chairperson	Chairperson D

Vice-Chairperson	Vice Chairperson D
Treasurer	Treasurer D
Finance Officer	Finance Officer D
Additional Member	Additional Member D
SCHOOL E	
Principal	Principal E
Chairperson	Chairperson E
Vice-Chairperson	Vice Chairperson E
Treasurer	Treasurer E
Finance Officer	Finance Officer E
SCHOOL F	
Principal	Principal F
DEPARTMENTAL OFFICIALS	
Circuit: Deputy Manager Governance	Departmental Official A
District: Chief Education Specialist	Departmental Official B
Province: Deputy Chief Education Specialist	Departmental Official C

It is worth noting that -with the focus-group interviews- two additional Finance Committee members were targeted as participants for the research. However, in all the six schools, the second additional member did not participate in the interview session. In Schools C and E, additional members were not present. The reason was that they did not have such positions in the Finance Committee. Schools A, B and D had only one additional member. In School F, the SGB did not participate in the study as they suspected that the researcher was conducting a criminal investigation.

5.5 DATA ANALYSIS PROCEDURES

Data analysis comprised three main parts: the procedures for analysis of interview data, observation data, and data from the analysis of documents.

5.5.1 Interview Data Analysis Procedure

The researcher can use different data analysis methods to analyse the collected data. The researcher chose thematic analysis as the most suitable data analysis method in the current study. Braun and Clarke (2006) describe thematic analysis as “a qualitative method for identifying, analysing and reporting patterns (themes) within data.” This method was chosen because it can produce a detailed description and organisation of qualitative data. In analysing interview data, the researcher presented the findings by writing down the theme; then, all participants’ responses were captured. The data were presented and transcribed into themes and sub-themes. Verbatim quotations from data were used. A detailed analysis of the relationship that arose within and between data respectively was followed. The relationship helped the researcher to code, categorise and condense the data. The researcher was able to draw meaning and interpret the extracted data.

5.5.2 Procedure for Observation Data Analysis

Observation is one of the data collection strategies researchers use to naturally explore the research settings (McMillan & Schumacher, 2010). During observation, the researcher’s role was that of a non-participant observer. Non-participant observer means the researcher records data without directly involving the people or being part of the activity (Creswell, 2016). The researcher wrote notes and linked them to the phenomenon under study. To analyse non-participant observations, the researcher studied the notes written at the research sites and presented the findings. As a non-participant observer, the researcher observed without participating in the natural setting. The physical conditions of the school formed part of the observation. These conditions included availability, maintenance and renovation of classrooms, laboratories, libraries, computer centres, safety and security, and learning and teaching support materials. Non-participant observation enabled the researcher to observe the school’s physical conditions, confirm the participants’ responses, and observe unpredicted data sources.

5.5.3 Procedure for Documents Analysis

Six secondary schools were requested to analyse their documents, and it was granted. Permission to access copies of these documents to study them later was also granted. Using copies of documents rather than originals gave the researcher sufficient time to read and analyse the documents at the researcher's most convenient time. Documents analysis was used to supplement data obtained through interviews and observations. Henning, Van Rensburg and Smit (2004) argue that document analysis assists with data left out during the interviews. Against this background, document analysis was used to gather supplementary information that the researcher could not get during the interview and observation. Based on the research aim and question, the researcher carefully studied and analysed documents with relevant school information, such as the School Development Plan, School Improvement Plan, school budget, school policies on finance, procurement, fundraising, asset and maintenance, Learning and Teaching Support Materials and registers.

5.6 THEMES AND SUB-THEMES EMERGING FROM INTERVIEW DATA

The themes and sub-themes are presented in the table below. Detailed narratives follow each theme.

Table 5.2: Themes and Sub-themes

THEMES	SUB-THEMES
Theme 1: Implementing the national funding model advances quality education in rural public schools	Sub-theme 1: Budget planning Sub-theme 2: Budget implementation Sub-theme 3: Monitoring and control of school finances Sub-theme 4: Structures and systems

<p>Theme 2: The challenges schools in rural communities face in implementing the national funding model to ensure quality education</p>	<p>Sub-theme 1: Insufficient funding</p> <p>Sub-theme 2: Safety and Security</p> <p>Sub-theme 3: Capacity of School Governing Bodies (SGBs)</p>
<p>Theme 3: Addressing the challenges emerging from the management of state-allocated funding by rural schools' principals and School Governing Bodies to ensure quality education</p>	<p>Sub-theme 1: Fundraising and donations</p> <p>Sub-theme 2: Training and workshops</p>
<p>Theme 4: Advancing quality education through educational resources in rural public schools</p>	<p>Sub-theme 1: Availability of educational resources</p> <p>Sub-theme 2: Procurement of educational resources</p> <p>Sub-theme 3: The impact of educational resources on learner performance</p> <p>Sub-theme 4: Lack of educational resources</p>
<p>Theme 5: The proposed funding model to address the challenges encountered in advancing quality education through the national school funding in rural South African schools</p>	<p>Sub-theme 1: The Funding model</p> <p>Sub-theme 2: Infrastructure and resources</p> <p>Sub-theme 3: Financial responsibility and accountability</p>

5.7 NARRATIVES OF THEMES AND SUB-THEMES

The themes and sub-themes were presented to align with the research questions and objectives. The themes and sub-themes originate from data obtained through in-depth interviews with six school principals, three departmental officials, and focus-group interviews with the finance committees of the five SGBs.

5.7.1 Theme 1: The implementation of the national funding model to advance quality education in rural public schools

The theme answers the following research question: How is the national funding model implemented to advance quality education in rural public schools? The sub-themes identified under this theme are the following: Budget planning; Budget implementation; Monitoring and control of school finances and Structures and systems. They are discussed below.

5.7.1.1 Sub-theme 1: Budget planning

This sub-theme emerged from the question on participants' role in managing the state-allocated funding to ensure quality education. The participants seemed to regard one of their roles as planning the budget. The quotations below indicate how the participants explained their role in budget planning:

As a principal of this school, the main function I play in managing state funds is advisory and ensuring that whatever plans are put in place for using these funds are adhered to, and we try to implement them as per our plan. Working with the staff as the funds come to our school, we mainly look at the needs of our school, and before we can use the funds, we prioritise improving the quality of education. That's the advice I give to SGB and the staff. We also ensure we follow the guidelines as per the prescripts in managing the funds very well. When drawing the draft budget, we follow the prescripts as we must be guided by the policy, which indicates how much percentage is allocated to the curriculum. (Principal A).

As the principal, I must follow departmental policy by using the prescripts by drawing a budget and distributing the money in terms of the required percentages; 60% Curriculum, 17% administration, 10% sports and 8% ablution. As our school is small, our budget drawing starts with teachers as we don't have departments. I, the finance officer and the treasurer consolidate the

teachers' needs. I then submit the draft budget to the SGB for final consolidation. We then present it to the parents for discussion, and once we have agreed, we send the final budget to the Department. (Principal C).

In our school, every year in July, the budget process starts. The SGB starts by contacting the different departments in the school about the shortages and other resources they will need for the coming financial year. After that, in September, the finance committee meets with the SGB, and we start drafting the budget for the following year. We give the process about three weeks, wherein we come up with inputs until, in the end, the finance committee gets the final budget, which will be adopted by the stakeholders, the staff and the SGB. Lastly, we take it to the parents in November for final adoption (Principal E).

The quotations above suggest that the principal plays a critical role in supporting and helping the SGB when drawing the school budget. This is because they are acquainted with the relevant policies that guide the development of a school budget. The quotations show that the principal ensures that the school needs are prioritised when the budget is drawn. It is clear from the participants' responses that although school heads are crucial at the budget development stage, all stakeholders should be consulted. In other words, the final budget should be a collective product that has followed all the processes required by the applicable laws for managing and administering school funds.

5.7.1.2 Sub-theme 2: Budget implementation

In this sub-theme, participants stated that they use the state-allocated funding in line with the allocated percentages, as directed by the prescripts for managing and administering school funds. They also indicated that three quotations are sought when procurement is done. One participant raised a concern that they were sometimes forced to use these monies to outsource teachers, as they had a shortage of teachers, even though they later refunded the money through funds raised from the parents. Furthermore, COVID-19-related expenses had a share in the school budget, as required by the Department. The participants' responses were as follows:

Sometimes we have a shortage of teachers; we use this allocation to pay the teachers we are insourcing. But we talk with parents as a way of raising funds. We use the money for ink, as it is too expensive and nowadays it is worse as we also must buy sanitisers with this money. According to the allocated percentages, we use our money following the prescripts (Chairperson B).

We spend the money in terms of the percentages in the budget. We also do monthly reconciliations to know how much we have spent and how much is left monthly (Finance Officer C).

We buy using three quotations. We look at the quotation which is low in price. We also reconciled monthly how the money was used (Chairperson E).

We need three quotations when we buy school material. We ensure we don't finish the entire budget, as the Department sometimes takes a long time to pay the allocations (Finance Officer D).

The researcher found from the participants that schools find it challenging to use the state-allocated funding to pay for insourcing teachers. The other finding was that expenses for COVID-19 were inconvenient for the schools, as they did not receive additional funding specifically for these expenses. The researcher believes that schools should get additional funding specifically for these purposes. The researcher believes that other school priorities will be compromised if schools do not get additional funding for COVID-19-related expenses. From the participants' responses, it became clear that schools strive to comply with the Department's directives. The schools were also trying to use the money following their budgets to ensure that procurement processes were followed.

5.7.1.3 Sub-theme 3: Monitoring and control of finances

In this sub-theme, one acting principal indicated how monitoring and control of finances were done differently from other schools, as they had been put under administration by the Department due to allegations of financial mismanagement at the school. The other

two participants, Departmental officials, stressed that they complied with the prescripts of the Department on their utilisation of school funds. Monitoring and controlling finances at the school were done mainly through submissions of monthly financial reports, minutes on the decisions taken, quotations and Annual Audited Financial Statements (AAFS). Lack of human resources within the district, which was noted, made it impossible for the Departmental officials to do school monitoring to check how schools utilised the state-allocated funding. The responses are as follows:

The finance officer compiles financial reports every month, and at the end of the financial year, we take the books to the auditors. When we want to buy things, as we are under administration, we meet as SGB and agree on what we want. We are under administration, as it is alleged that the funds were not being adequately used last year. FINCOM seeks three quotations from there and recommends what should be bought and the company that must supply or do the work. FINCOM takes the report to the SGB, recommending which quotation and company should be chosen and why. Every month the finance district manager comes to the school to approve all payments that must be made for that particular month and to check if we are following the regulations, as we are under administration (Principal F).

I usually check whether the schools use the money in line with the prescripts. Also, they submit monthly returns on how they spent their allocations before the 7th of every month. When they have projects, I monitor whether they have three quotations and the reasons for the quotation they choose. I also check the minutes as records on decisions taken. As the circuit office, we approve the amounts for projects up to thirty thousand rands. For amounts above this, it becomes the responsibility of the district office. Like now, as it is during COVID-19, their percentage in terms of utilisation of the monies has changed. I monitor if the schools use the money in line with their budgets, such as 60% for the curriculum. I ensure that there are minutes to support budgets when budgets are submitted. I also ensure that the common practice of principals spending much money on transport is prevented, as they must spend for

transport in terms of the percentage, as directed by the prescripts (Departmental Official A).

Ordinarily, we should check if the schools are using the money in line with their budgets and prescripts. So, our role is to check if schools are budgeting correctly, as per the prescripts, and the deputy governance manager approves the budget at the circuit office. We monitor the utilisation of the monies through the Annual Audited Financial Statements. It is just that we don't have human resources. If we had the staffing, we should go to schools to check how they use the monies. But for now, we rely on the audited financial statements and the auditors' reports (Departmental Official B).

From the above sub-theme, the researcher inferred that Departmental Officials avail themselves to schools to ensure that finances are appropriately used where there are financial irregularities. However, under normal circumstances, they relied on the submissions made by the schools. This practice was also confirmed by the Departmental official, who said that they monitored and controlled school finances through AAFS, as they lacked human resources to attend school. Another finding shows that a large portion of the state-allocated funding goes towards transport, which should not be the case regarding the prescripts, as there are prescribed allocated percentages on how the funding should be utilised.

5.7.1.4 Sub-theme 4: Structures and systems

The opinions articulated by the participants were that they have finance committees and systems in place to ensure that financial matters are carried out. The finance committees performed their roles to ensure they met monthly, compiled financial statements for each month and reported to the SGBs and the circuit office. They also ensured that the financial statements were audited at the end of the year. Some participants responded as follows:

The finance committee meets monthly to look at purchases to be made in line with the budget. After that, the procurement committee requests quotations and submits them to the finance committee. The finance committee then

recommends the service provider to be used. The finance committee also checks monthly that the expenditure aligns with the specified budget item. They reconcile their books monthly and report to the circuit office quarterly. The finance committee reports to the SGB quarterly on expenditure. At the end of the year, we take our books to the auditors. When the books come back, we give the parents the report on the audited financial statements (Principal B).

We strictly adhere to the budget and apply the finance policy. We also use the finance committee by meeting to draw the financial reports during finance committee meetings. After that, the reports are given to the SGB and submitted to the circuit office monthly. Quarterly, we give parents financial reports and the circuit office. We also have Annual General Meeting to report on the Annual Audited Financial Statements (Principal D).

The finance committee reports to the SGB every month. The finance committee is the same SGB, but now the treasurer becomes the Chairperson of the finance committee. We also report monthly to the circuit office. To the parents, we report once towards the end of each term (Principal E).

We report to the SGB monthly. I submit monthly financial reports to the circuit office every month. We report to the parents in January when books come back from Auditors (Finance Officer C).

The finance committees at the sampled schools met monthly to perform their duties of compiling monthly financial reconciliations. Reporting on financial reconciliations to the SGB and the circuit office was also done consistently. Auditing financial statements at the end of each year was made after the auditors returned the financial books. The AAFS were reported to the parents and the Department through the Circuit Office. The researcher found that the finance committees were executing their duties as required in terms of the provincial directives, except where one participant mentioned that the Finance Committee is the same SGB. The difference is that during the Finance Committee meetings with the SGB, the treasurer becomes the Chairperson.

5.7.2 Theme 2: The challenges rural schools face in the implementation of the national funding model to ensure quality education

This theme answers the research question: What challenges do schools in rural communities face in implementing the national funding model to ensure quality education? The sub-themes that emerged from the participants' responses are insufficient funding, Safety and Security, and Capacity of the SGBs. These sub-themes are discussed below.

5.7.2.1 Sub-theme 1: Insufficient funding

Under this sub-theme, most participants indicated that the funding that the Department allocated to their schools was too little. This concern is accurate, as the schools could not procure all the necessary educational resources. The parents were poor and could not help the schools financially. Some of the participants responded as follows:

Eh! The challenges we have in utilising this money is that it is too little, and distributing it is difficult. Lack of resources sometimes hinders learners' performance (Principal A).

The funding is too little and does not come all at once. They divide it into two payments. Sometimes when photocopiers and printers break, we cannot fix them, as we would still be waiting for the other payment, as the first one would be finished. We also find it challenging to buy printing paper, as we use it a lot and it takes much money. Sometimes we have no choice but to buy stationery on credit, and when the second payment comes, all the money goes to the people we owe. Teachers are also sometimes forced to use spoilt paper. Often, during examination times, all the money would be finished, which is when it is needed the most (Treasurer C).

This money is too little, but it helps a lot. For example, we can outsource teachers to give our learners extra lessons. We check the analysis of results

to check which teachers need assistance. Our parents are poor and can't afford to pay school fees (Chairperson E).

From the above findings, it was clear that the state allocated funding is insufficient. It makes it difficult for schools to buy learning and teaching materials and maintain educational resources, such as photocopiers and printers. Sometimes schools find it very hard to buy paper and use spoiled paper. The funding is unable to sustain the schools throughout the financial year, making it difficult for schools to implement the planned budget. Nevertheless, although most schools struggled financially, a few were given sufficient funding. However, the challenge with these schools was that they could not spend some of the money due to the restrictions imposed through the prescripts from the Department put on the utilisation of state-allocated funding.

5.7.2.2 Sub-theme 2: Safety and security

In response to this sub-theme, the participants indicated that burglaries and theft of educational resources, such as photocopiers, happened regularly, as safety and security were challenging at their schools. They were seriously concerned that the money intended for things that had been budgeted ended up being used for repairs of the school property and replacement of educational resources. They echoed their sentiments in the following way:

We also have a problem with burglaries. Thieves come to the school and break our strong rooms. As a result, we end up using the money for things we had no budget for, as we must fix the substantial room many times (Chairperson A).

Our school is in the bush and does not have security. We also can't hire security personnel, as the prescripts don't allow us to do so. Vandalism and crime are also frequent in our school, as most windows and doors are often broken, and photocopying machines are stolen (Principal B).

We need a substantial room, and we have been promised one by some sponsors. But the challenge is security. Getting a strong room is a serious challenge (Chairperson E).

These people don't have a love of the school at heart. Even now, they have stolen the copper wires. They steal something every day. Regarding toilets, we don't have any, as I am speaking now. This is because they have stolen the copper pipes. We have one security personnel who comes to school during the day. In December, they stole the palisades, and we are now back to square one (Principal F).

The findings above suggest that some schools are frequent crime targets, as they are subjected to repeated burglaries and theft within a short time. Worrying is that the perpetrators of these repeated crimes are not caught. This failure suggests that schools would develop faster if these crimes could be prevented. The money used to repair facilities and replace resources could be used for their intended budgetary purposes. It clearly shows that schools need the Department to provide safety and security to prevent these thefts. Crime at these schools could also be a sign of underlying social problems, as the schools serve disadvantaged communities. Perhaps, this is in reaction to educational failure by the thieves. The financial advantage might be the cause for the theft of educational resources. Equally, the misbehaviour during the school day might also be strongly influenced by the social environment in which the school is located.

5.7.2.3 Sub-theme 3: Capacity of the School Governing Bodies (SGBs)

In this sub-theme, the participants showed that SGB members in rural schools lack the required skills to deal with governance issues. It was also found that most children were under the care of their grandparents, as their parents were working too far away from home. Due to the lack of governance skills by SGB members, school principals and finance officers took advantage of the low education level of SGB members and did as they wished to benefit themselves. Another problem was that SGB members were not conversant with their roles and responsibilities; they only cared about the benefits, such

as the food they bought when running school errands. Some participants said the following:

Most SGB members in rural schools are grandmothers and grandfathers, as the birth parents of learners have gone to look for work too far away from home. Theirs (grandparents) is to see their grandchildren attending school and nothing else. That's why sometimes they even sign blank cheques without attending meetings to discuss financial matters. Principals are the ones who are in control of SGBs in rural schools, as they take advantage of the low education level of their SGB members. SGBs just listen to the principals (Departmental Official A).

Because we rely mainly on the principal, the principal can manipulate the SGB for their benefit (Departmental Official B).

Most of the parents in rural communities their literacy levels are deficient. The SGB doesn't have any skills that they can offer to governance. They are just there because they are the learners' parents and eligible to be members of the SGB. So, you find that the only people who understand financial issues are the principal and the finance officer (Departmental Official C).

First, the SGB-parent component doesn't understand when you explain how the money should be utilised. I have tried several times to explain that the budget aims to do these, but the Chairperson will just come in and ask for transport and catering money whenever he goes to town. Lack of knowledge of the SGB in running the school finances is a problem (Principal C).

The above quotations show that the SGB is a significant stakeholder in the school and influences the quality of education offered to the learners. Their functionality level also has a significant influence on the success of the school. The SGB is a crucial stakeholder that impacts the vision and ethos of the school. For a school to achieve optimally, the SGB should play its intended role. This shows that it is vital that when SGBs are elected, people who have the necessary knowledge and skills are elected. Furthermore, adequate

training must be to support them with their governance functions after the elections. This finding suggests that the SGB must influence the type of education offered to learners and ensure that all children achieve their full potential.

5.7.3 Theme 3: Addressing the challenges emerging from the management of state-allocated funding by rural school principals and School Governing Bodies, to ensure quality education

This theme answers the research question: How do rural school principals and School Governing Bodies address the challenges emerging from the management of state-allocated funding to ensure quality education? The sub-themes that emerged from the theme are the following: fundraising and donations, as well as training and workshops. The sub-themes are discussed below.

5.7.3.1 Sub-theme 1: Fundraising and donations

The participants' responses indicate that schools are trying to fundraise but find obtaining the funds they need challenging. This is because the schools use fundraising measures that are not effective. From one participant's responses, discrimination amongst the schools still exists, as no-fee schools cannot charge parents school fees whilst fee-paying schools can charge parents school fees. They expressed their views as follows:

We tried to fundraise, but it is difficult as the parents are complaining that the school likes money. They better take the children to the neighbouring village, where learners do not pay casual monies and are not required to bring 'Typek' (printing paper) to school (Vice-Chairperson A).

On Fridays, learners wear casual clothes. Also, informal traders sell their goods in the schoolyard and pay a fee. We wanted to use this money to pay the outsourced teachers. We also tried getting donations from the farmers, but we failed (Finance Officer B).

We don't have many learners, and the Department gives us little money. We also can't afford a lot of educational materials. We are suffering as no-fee

schools as we can't make parents pay school fees, but schools in towns can charge school fees. We are discriminated against (Treasurer C).

The researcher assumes that -whilst the primary task of the new government of South Africa was to establish a racially just and equitable education system- past imbalances still existed. The current education system is still not reformed to significantly address the inequalities of the past in establishing a new education system created on the constitutional virtues of Social Justice. The democratic government aims to promote equity and equality in the distribution of resources to schools. Whilst the researcher understands that the no-fee system is a means the government uses to close the disparities among the schools in South Africa, inequalities still exist in the financial capacity of schools.

5.7.3.2 Sub-theme 2: Training and workshops

Most participants shared the same sentiments concerning workshops being conducted to train them on their roles in financial management and adherence to the prescripts on the management of school funds. However, these workshops were conducted occasionally. One Departmental official indicated that they have planned to train all the schools within the district during the year 2021. He further indicated that the main target was high enrolment schools, as the schools do not adhere to their planned budgets when utilising the state-allocated funding. Another challenge mentioned was SGBs, who had financial interests in the procurement processes, to benefit themselves. The responses were phrased in the following way:

We workshop them. Like now, as the new SGBs are elected, we will induct them so that they know their roles and how they should use the prescripts (Departmental Official A).

Well, we are just coming from our strategic planning, and as governance, we realise that now we can train all schools or SGBs on financial management but supporting them at the circuit or district level by going to each school will not be possible. So, we do what we call target support. Like, our main

challenge is with high enrolment schools. These are the schools that are getting much money. These schools get above a million Rands and think the money can be used for whatever. So, our target for this year is to train all schools, but these high enrolment schools are the ones that we will monitor very closely. At the same time, we shall work closely with our principals because they are our ears and feet (Departmental Official B).

I mostly work directly with district governance managers and circuit deputy governance managers. Since I arrived, I never had a chance to attend school or address principals' gatherings. Maybe, shortly, I will have a chance to meet with rural school principals and get their views on the challenges they encounter in financial matters. But I studied school capacity building for financial management (Departmental Official C).

Financial Management workshops are conducted once in a while. So, support is lacking as it is not continuous (Treasurer D).

The above responses suggest that SGBs need to be empowered with the required financial management knowledge and skills. Similarly, as the SGBs are entrusted with school funds, they must acquire the necessary governance skills. Accountability on their part can be achieved using suitable training that meets their lack of capacity. As a result of the SGBs having little governance skills, the state is obliged to provide capacity building for SGBs in continuous training. The capacity building expands SGBs' competence to perform their responsibilities as required by the Department and the prescribed regulations. SGBs also need to be empowered to take well-versed decisions for the benefit of their schools and learners. Suitable capacity-building will assist in managing non-compliance regarding the prescripts for managing school funds and implementing the school budgets. Effective and efficient financial management will make schools succeed in providing quality education. The quality of empowerment the SGBs obtain equates to the responsibilities to ensure that teaching and learning are of a high standard.

5.7.4 Theme 4: Advancing quality education through educational resources in rural public schools

The research question under this theme was: How are the educational resources used to advance quality education in rural public schools? In the interview, the researcher wanted to determine how educational resources are utilised in rural public schools to advance quality education. The researcher clustered the findings according to the sub-themes: Availability of educational resources, Procurement of educational resources, the impact of educational resources on learner performance, and lack of educational resources.

5.7.4.1 Sub-theme 1: Availability of educational resources

Participants across this sub-theme cited the educational resources available at their schools. Educational resources that assisted them in improving the learners' performance were laptops, photocopiers, textbooks, printers and Wi-Fi. One participant from a low enrolment school indicated that they had a borehole that provides water, electricity, and enough toilets and classrooms. In one school with a high enrolment, a participant indicated that they even had duplicating machines, Wi-Fi, a library and a laboratory. She further mentioned that they had quality human resources, such as the best music conductor, debate coach, English, Mathematics Literacy and Commerce teachers in the region. Participants expressed their responses as follows:

We have 100 laptops kept at the school to be used by the learners. Teachers share them for all grades, but the challenge is with old teachers as they cannot use them. ICT is a challenge. We also have tablets and Wifi. We have ten laptops which the teachers use. They borrow them from the administration office when they want to use them and return them once they have finished using them (Principal B).

We have textbooks, photocopiers, electricity, boreholes and enough toilets. We also have enough classrooms (Vice-Chairperson C).

Laptops help us as we can send circulars, assignments and other activities to learners. We can also use printers to print out question papers, unlike before, when the principal used to go to the circuit office to collect question papers. Teachers also develop as they learn how to use laptops (Additional member D).

We have got the Wi-Fi, which is helping. We also have many duplicating machines. We also have a library and a laboratory. This school is well equipped, but with the millions, we are getting, we don't develop because of crime. Like, we keep on fixing ablution facilities due to theft of copper pipes. Ablution maintenance is very expensive. We have the best music conductor and debate coach in the area. We have the best English, Mathematics Literacy and Commerce teachers (Principal F).

The above quotations show the inequalities between the fee-paying and no-fee schools regarding available educational resources. From the participants' responses, it is evident that the government needs to ensure that the specific needs of rural schools are met, as the country has a single education system. The lack of adequate educational resources shows that the government (Department of Basic Education) is to provide or fund educational resources in rural schools. Those past imbalances are not perpetuated, especially looking at electronic educational resources as teaching and learning. Therefore, the use of electronic resources and the internet form an integral part of quality education. Rural schools must not be classified as isolated and discrete, whilst they are subjected to the same policies as other schools in South Africa. The participants' responses confirm that rural schools do not yet have access to the same quality LTSM, facilities and educational opportunities, such as classrooms, electricity and water, internet, laboratories and libraries, compared to their counterparts at urban schools.

5.7.4.2 Sub-theme 2: Procurement of educational resources

What was common under this sub-theme is that electronic devices play a significant role in promoting quality teaching and learning. The finding is that while schools have bought

and donated educational devices like laptops, interactive boards, photocopiers and WIFI, they are still struggling financially to meet most of their needs. They use state-allocated funding to procure these educational resources and ask for donations from big companies such as Cell C and MTN. In one school, a participant indicated that they had entered into a credit agreement to procure educational resources. However, they struggled to honour their payment agreement with the creditor. The participants responded as follows:

We took some educational resources on credit. We live from hand to mouth. If our school were a person, the creditors would have taken us to the credit bureau, as sometimes, we don't honour our credit agreement with them due to insufficient funds and the Department paying us late (Finance Officer C).

We bought laptops using school money. We got others from Cell C and tablets that the teachers use. Teachers share them (Finance Officer D).

We bought some laptops, and MTN donated six laptops. Interactive boards and overhead projectors were bought through the norms and standards monies for development (Principal E).

For Wifi and the photocopier, we used the norms and standards money. We have Wi-Fi around the school because we can afford it (Principal F).

The researcher deduced from the participants' responses that although rural schools try to make ends meet, they struggle financially. Their funding is, to a large extent, limited, and they rely on donations. Even when they get donations, such donations are insufficient to meet their demands. Limited funding results in rural schools being unable to have similar resources available in urban schools. These situations create barriers for rural schools to achieve satisfactorily academically. Their inability to procure educational resources required to improve academic achievement negatively affects effective teaching and learning. The financial constraints the SGBs face when buying educational resources create a burden for them, as they are responsible for advancing the learners' best interests: quality education.

5.7.4.3 Sub-theme 3: The impact of educational resources on learner performance

The participants expressed a common view concerning the positive role educational resources play in improving learners' performance. They indicated that electronic educational resources positively impact teaching and learning, as they arouse the learners' interest. As devices like overhead projectors are used for demonstrations, they help learners understand the subject content much easier and faster. Their expressions showed that the more resources they get, the more the learners' results improve. However, one participant expressed a different view concerning the appointment of good teachers, saying that he headhunts good teachers in terms of the streams that his school offers so that the school has capable teachers and performs academically well. Other participants responded as follows:

Yes, they are helping. I want to indicate that the first matric pass rate was 58%, but in the second one last year, we obtained 88.5%. Last year, I encouraged and demonstrated to the teachers how we could use these resources. The learners are really enjoying it, they don't get bored, but when you go to the class and do, as usual, they get bored. So, with these resources, you can teach much content, you don't just write, but you project what you want to teach. We can discuss as the picture is very clear and colourful, making them understand much easier and quicker. We give learners notes and use the overhead projector (Principal A).

At the end of the year, learners' results are good, but we still need more resources. The results will improve even more if we get more resources (Chairperson B).

I have recruited teachers who specialise in the subjects they are teaching. The school's vision is to teach and develop the learners to do well in Maths, Sciences and commercial subjects. So, we have managed to recruit teachers in these streams. I recruited them myself as we don't have teachers who

choose to come and work here. I have headhunted them. That is why this school has improved in performance (Principal D).

They improve teaching and learning, as teachers are no longer using the old ways of teaching. With the use of these resources, they can simplify teaching and learning. They arouse the interests of the learners (Chairperson E).

The participants' responses show that appropriate educational resources and facilities promote good learner performance. Educational resources play a significant role in learning and improving learners' academic achievement. Therefore, the provision of appropriate educational resources facilitates quality education. The suitability of educational resources was seen as a determinant for effective teaching and learning. Therefore, the educative process is made more accessible by using educational resources that arouse the learners' interests as learning becomes enjoyable. Therefore, appropriate educational resources, such as overhead projectors, improved learners' results. Thus, the Department of Basic Education to respond to the demands of schools in terms of providing appropriate educational resources that will enhance teaching and learning in schools. The response of one of the participants, who held a different view of qualified teachers, shows that the availability of LTSM and physical facilities without the best-qualified teachers would not make any difference. This is because quality resources require teachers who are competent to utilise them.

5.7.4.4 Sub-theme 4: Lack of educational resources

The responses in this sub-theme show that the participants still face severe challenges in securing electronic educational resources. These include laptops and tablets, all required to transform traditional teaching methods to modern ones that depend primarily on electronic equipment. Another finding that emerged was that a teaching and learning culture based on the assistance of electronic resources is still a challenge in rural schools. What makes the situation even worse is that these schools do not even have computer rooms, laboratories and libraries. Furthermore, some schools, especially small ones, still

have a shortage of teachers in crucial subjects, such as Physical Science, Geography and Life Orientation. Some of the participants' responses are as follows:

We need tablets and data for each child to do schoolwork such as assignments while at home. I think e-education is very important for them (Principal B).

We have a shortage of physical science teachers. We outsource teachers to come and teach learners. Like in geography and life orientation, we have one teacher teaching these two subjects from Grade 8 to 12. The teacher can't be productive. A teacher cannot teach from Grade 8 to 12. This is a challenge. It makes them tired. The Department should assist small schools. (Finance Officer A).

We want a well-equipped computer room. Teachers can teach easily using computers if we can have a mini library in each classroom at the back, according to the subject streams (Treasurer E).

We need a laboratory, as it helps in physics and life sciences. If learners do experiments, they don't forget easy, but it is difficult to understand if they just do the theory. We also need a library as we have books all over the school. Some are old, and we don't know what to do with them. We also need radios so that they can listen to educational programmes that offer lessons. We don't even have a mere radio (Additional member B).

In this sub-theme, the participants' responses showed that -despite the available resources at the schools- there are still significant shortages that need to be filled so that rural schools can operate like their opulent counterparts. In rural schools, the lack of electronic educational devices, such as laptops, tablets, and physical facilities, persists in the post-apartheid era. These devices are fundamental for delivering quality education. Furthermore, these devices are required for the fourth industrial revolution and e-learning to be promoted. A shortage of teachers is a common problem in many rural schools. The researcher found that the right to education in many rural schools is still being trampled

upon. This clearly shows that the rich still have more educational opportunities than the poor, perpetuating past inequalities.

Furthermore, inadequate funding affects small schools more than high-enrollment schools, which receive sufficient funding. Inadequate funding creates problems for the small schools because they cannot buy LTSM computers and build physical facilities such as computer centres, laboratories and libraries. In addition, insufficient makes it is difficult for small schools to get all the teachers they need, resulting in teachers having to teach many subjects and Grades. This negatively affects learner performance.

5.7.5 Theme 5: Proposed funding model to address the challenges encountered in advancing quality education through the national school funding in rural South African schools

The theme answers the research question: Which possible funding model can be adopted to address the challenges encountered in advancing quality education through national funding in rural South African schools? The following sub-themes were identified: Funding model, infrastructure and resources, and financial responsibility and accountability.

5.7.5.1 Sub-theme 1: Funding Model

The interviews conducted with the participants revealed that the current funding model provides inadequate funding to rural schools. This is because the state-allocated funding does not meet the demands of these schools. Furthermore, as these funds are regulated, these schools sometimes have to contravene the prescripts and effect payment for outsourcing teachers. As expressed by one principal participant, small schools suffer the most from this problem. The participants' responses also indicated that the criteria used to determine state funding are unfair, as they do not look at the schools' needs but only at learner enrolment. Generally, the participants were unhappy that the Department was allocating school funds differently, based on just location. These participants believed the Department should allocate funding by looking at the submitted budgets to close the gaps between rich and poor schools. Another challenge, as expressed by the participants, was

that funding was not inflation related. A further concern was that the prescripts for using the state-allocated funding should be relaxed, as it had too many restrictions. The issue of consulting the SGBs, regarding the funding model was also expressed.

The current funding model provides little money for an individual learner. I would suggest that Quintile 1 to 3 get more funding that matches their goals. Another challenge is that the funding for Quintile 1 to 3 does not permit schools to use it to pay teachers' salaries, and sometimes schools are forced to break the law and use the money to pay for teachers, especially at small schools like ours. The criteria used to determine school funding is unfair, as it does not consider the schools' needs. We are only drawing the budget for compliance in terms of percentages, as it is challenging to implement it. I wish the Department would change the current model to accommodate small schools because small schools are suffering. As a result, many parents leave rural areas for urban areas, so the enrolment keeps decreasing (Principal A).

The Department should understand the needs of its schools. They should not treat all schools the same. They should ask schools what their needs are, and after that, allocate the money. They must also give schools the money and then continue checking if the schools are using the money for the needs they have listed (Vice-Chairperson B).

Suppose the Department can allow us to draw the budget, give it to them, and allocate money for the submitted budget. The Department should stop funding schools by just looking at the enrolment. They should also provide funding according to our needs by giving additional financial support to small schools. This current funding model still perpetuates past imbalances, as affluent schools continue to develop whilst poor schools continue to suffer (Principal C).

The Department should look at our needs as schools A and B do not have the exact needs. They should also look at other factors over and above, giving

schools allocations in terms of learner enrolment. For example, small schools suffer, as they don't have many learners. Small schools should be given a certain percentage of money over and above learner enrolment (Chairperson E).

The narratives above show South Africa's funding system and policies are still characterised by economic disparities between the poor and the rich in the post-apartheid era. These disparities create inequalities that cause unequal educational opportunities amongst learners from different socio-economic contexts. This shows that rural schools still grapple with meeting many demands despite getting more funding per learner. This is due to how funding is allocated and the regulations for utilising state-allocated funding. It is also evident that, despite the classification of schools in terms of quintiles, huge gaps still exist relating to learner academic success.

5.7.5.2 Sub-theme 2: Infrastructure and resources

The participants indicated that the Department ensures that rural schools have computer centres, water and sanitation, and internet connectivity. Another expectation is that if the Department cannot provide each school with a laboratory and library, it should build central laboratories and libraries for use by clusters of schools. Some of the responses were as follows:

They should also provide a computer centre to help the learners and the community. We need a computer centre. They should also look at basic things like water and sanitation. We need internet connectivity as well (Treasurer D).

Another recommendation was that laboratories and libraries be clustered in schools around one area, in a central place, for use by all schools. The schools would use a timetable to share the facilities because expecting each school to have its laboratory or library would be difficult. The present researcher believes building community libraries is the answer to this problem. Qualified personnel could be hired to work in these laboratories by assisting learners in accordance

with the needs of the teachers. This would greatly assist rural schools (Departmental Official B).

The findings suggest that infrastructure and resources play a significant role in facilitating teaching and learning activities. From the participants' responses, many rural schools do not have appropriate water and sanitation, buildings and electronic resources. It is also clear that there is a challenge with the shortage of facilities and resources such as computer rooms, science laboratories and libraries. This situation exists mainly in rural schools, and children from these schools do not have the opportunity to access adequate resources and infrastructure. This leads to the acquisition of inferior education.

5.7.5.3 Sub-theme 3: Financial responsibility and accountability

This sub-theme showed that the Department mainly monitors SGB accountability for the state-allocated funding rather than how these funds are used. As a result, the SGBs had the power to do as they wished in spending these monies, sometimes deviating from the budget. This is because there was no consequence management. Other challenges mentioned by the participants include illiterate SGBs, who found it difficult to cope with their financial obligations in managing school funds. This was aggravated by a shortage of departmental officials, who were supposed to build capacity for the SGBs. Even in cases where departmental officials were present, they had inadequate resources. As a result, reporting became a challenge. The participants also cited challenges such as lack of capacity by departmental governance officials, insufficient SGB training and problems that small schools had with their finances, as much of their budget paid for transport costs. Another response was that some SGB members connived with external auditors to produce inaccurate audit reports to cover the SGBs, for misusing the money. Some of the responses are as follows:

If only there'd be monitoring and evaluating of how this funding is used at rural schools. The problem is that there is only monitoring but no evaluation. All departmental levels should monitor the lower ones down to the school level. SGBs should not be given powers to do as they wish in managing these funds.

That is why principals benefit themselves. SGBs should be people who are knowledgeable about financial matters. The Department should also have consequences management for deviation if SGBs do not use the money according to the approved budget. They should also allow schools to fund fundraising through parents, even if these schools are no-fee (Departmental Official A).

In addition, there is a problem with SGBs who are illiterate. One other thing in governance is the training and capacitation of the SGB. We don't have resources. For instance, the assistant directors for governance in Limpopo are insufficient. If an assistant director leaves the system for whatever reason, there is no replacement. Also, those there don't have resources like a mere laptop. They are provided with cars through a government scheme and cell phones with data, but when it comes to reporting, it is a challenge, as they don't have work laptops. The trainers themselves should be thoroughly trained. But you often find it is just a manual, and you must go and train (Departmental Official B).

Ok, what I would suggest is to tighten accountability on the model. Remember, at the moment. We cannot hold the SGB accountable. The only thing when we find that the SGB can't perform their duties is we disband them. Also, where there is mismanagement of funds, and we cannot pinpoint it to say "this was intentional mismanagement of funds," it means the Department will not have a stance except to disband the SGB, as no one will take responsibility because those people are just volunteers (Departmental Official C).

The researcher deduced from the participants' responses that financial responsibility and accountability are the pillars of financial management in schools. This overall responsibility rests on the SGBs. However, in rural schools, SGBs experience challenges in executing these responsibilities due to a lack of financial accountability skills. Most parent-governors are illiterate or lack experience and training in financial responsibility and accountability. Additionally, poor training and lack of the necessary competency and

capacity by departmental governance officials are attributed to a lack of financial accountability practices among SGB members. Lack of financial accountability shows that incompetent SGBs cannot ensure fair and effective transparent use of financial resources, including preventing unauthorised, fruitless, and wasteful expenditure. What also emerged is that SGBs do not use credible independent external auditors, as they would be unable to connive with them to produce an inaccurate audit report. Proper financial accountability, in turn, leads to effective teaching and learning. It also shows that the Department's lack of implementation of financial accounting systems contributes to such a situation at schools.

5.8 NON-PARTICIPANT OBSERVATION

The researcher also conducted non-participant observation at the six sampled secondary schools. Schools A, B, C, D, E and F were named to ensure anonymity. The aspects the researcher focused on were the physical condition of the school, learning and teaching support materials, and equipment. The table below presents the findings. These are discussed in Chapter 6, which is the next chapter:

Table 5.3: Non-participant Observation

PHYSICAL CONDITION OF THE SCHOOLS	OBSERVATIONS
Classrooms	School A has eight newly built classrooms secured with burglar-proofing, and they were fitted with chalkboards, bulletin boards with displays, ceilings and floor tiles. School B has 19 beautiful classrooms, each with a chalkboard but no display bulletin boards. School C has ten cement-walled classrooms with chalkboards but no bulletin boards. School D has 17 classrooms in good condition but overcrowded, while School E has 16 classrooms in good condition, which

	shows regular maintenance. By contrast, School F has 35 classrooms that need to be renovated. The classrooms did not have display boards and were partially burglar-proofed.
Laboratories	All the schools do not have laboratories, except for School F, but it is not well-equipped. Teachers take the learners to the University of Limpopo for Science expos at School B. There was a mini laboratory at School C for physical science, life sciences and agricultural sciences classes. It also had microscopes, charts, and periodic tables.
Libraries	Schools A to E does not have libraries. School F has a well-equipped library with a librarian.
School hall	Schools from A to E do not have halls. School F has a hall which needs to be painted.
Computer Centre	Schools A, B, C, E and F do not have computer centres, but School D does, although it is not well-resourced.
Safety and security	School A has an alarm system in the administration block only. School B has steel palisade fencing. At School C, there is an alarm system in the principal's office, burglar bars and wire diamond mesh fencing around the yard. School D has an alarm system and wire diamond mesh fencing in the school principal's office. School E has an alarm system in the principal's office and secure fencing around the school, but School E is too far away from the villages. School F has cement palisade fencing, an alarm system in the administration block and security personnel engaged during the day only.

Electricity	All the schools have electricity.
Internet connectivity	Schools A and C do not have internet connectivity. Schools B, D, E and F do.
Water and sanitation	Schools A and B have enviro-loo toilets and boreholes. School C has pit toilets and a borehole. School D has a challenge of scarce water and insufficient toilets for all its learners. School E has a borehole and flushing toilets for both teachers and learners. School F has a serious hygiene challenge, as the ablution facilities are poorly maintained.
TEACHING AND LEARNING	
Learning and teaching support materials and equipment used for teaching and learning.	School A had a minimal shortage of textbooks. There was an overhead projector that was used for physical sciences experiments. School B had a shortage of textbooks for most subjects and scientific equipment. School C had most textbooks. In school D, sufficient textbooks were supplied, even though some old ones were worn out. School E had enough textbooks in all the subjects, equipment for experiments and teacher study guides. There were also overhead projectors, white interactive boards, DVDs, VCRs and data projectors. In school F, there was a shortage of textbooks and stationery.

5.9 DOCUMENTS ANALYSIS

As stated in sub-section 5.5.3, the researcher requested the following documents to supplement data obtained through interviews and observations: School Development Plan, School Improvement Plan, School Budget, Finance Policy, Procurement Policy, Fundraising Policy, Assets and Maintenance Policy, LTSM policy and LTSM Register

from the six sampled secondary schools. The data from the analysed documents are presented below and discussed in the next chapter.

5.9.1 School Development Plan (SDP)

The researcher found that Schools B, C, E and F owned the SDPs, except for School A and D. In School B, the SDP was aligned with the SGB's three-year term (2018 – 2021) and covered the following performance measures: maintenance of buildings, gardening, school security, water reticulation equipment, beautification, extra-mural activities, quality of education during COVID-19, leadership and management during COVID-19, as well as personal development, and behaviour and attitudes. At School C, the SDP was available, but it was developed for the year 2019. It did not include the essential elements of the SDP, such as budget, responsibilities, timeframes and performance indicators. At School E, the SDP was for three years (2018 – 2021) and covered the following objectives: academic, sports and recreation, water and sanitation and security for the school property. At School F, the SDP was for the years 2018 – 2021. It covered the following development areas: tablets for learners, photocopy machine, strong rooms, an extension of assembly shade, installation of blinds in the administration block, installation of air conditioners, reconstruction of toilets, installation of tiles in the administration block and school hall; buying office and administration block furniture; reconstruction of fence around the school, buying of a water pump, directive boards, laptops for all SMT members and white-boards for all classes.

5.9.2 School Improvement Plan (SIP)

Schools A, B, C, E and F did not have SIPs for 2021. School D was the only one that was able to provide its SIP. In school D, the overall set improvement target was 85%. The improvement strategies involved increasing contact time. To cover the syllabus and have time for revision, monthly assessments, schedules, improvement plans for subjects in which learners underperformed, diagnostic analysis of all assessment tasks for remedial purposes, learner profiling on and specialised attention to poor performing learners and enrichment classes for a catch-up.

5.9.3 School Budget

All six schools had their 2021 budgets. In school A, the state-allocated funding was R197 836.00. The allocation was distributed for the following expenses: curriculum, transport, administration, sports, and COVID-19 essentials. The approved and stamped budget was signed by the SGB chairperson, treasurer and the school principal. The state-allocated funding at School B was R536 524.80. The distribution was as follows: administration, teaching and learning, COVID-19 essentials, sports, transport, salaries and National Schools Nutrition Programme (NSNP). Salaries and NSNP had additional funding: R156080.00 and R65 460.00, respectively. There was also confirmation that the budget was presented to the parents for ratification and approval.

The SGB chairperson, treasurer, secretary, and school principal signed the budget. In School C, the state-allocated funding was R101 593.80. There was also a fundraising income of R18 720.00. Administration, curriculum, COVID-19 essentials, transport, and sporting activities were covered as expenditure items. The principal, SGB treasurer, and Chairperson stamped and signed the budget. It did not have any indication of approval by the parents. The budget at School D was done while guided by the state-allocated funding of R1 040 400.00. The expenditure estimates included administration and security services, teaching and learning, COVID-19 essentials, ablutions and transport. The budget was not signed and stamped and did not show any approval from the parents. At School E, the allocated state funding was R442 982.40, distributed for administration, teaching and learning, sporting activities, COVID-19 essentials and transport. The budget was stamped and signed by the SGB chairperson, treasurer, and principal. Due to COVID-19 regulations on gatherings, their budget was not presented to parents for ratification. At School F, the state-allocated funding was R1 666 560.00; from fundraising, they had R57 517.44. The school had a balance brought forward from 2020 of R864 661.00. Budget expenses were allocated for administration, curriculum, COVID-19 essentials, sports, transport and payment of the cleaners. The budget document was stamped and signed by the SGB chairperson, treasurer and secretary, and the principal. The budget was not presented to the parents for ratification and approval due to COVID-19 regulations on gatherings.

5.9.4 Finance Policy

All six schools provided their finance policies. At School A, the policy covered the composition and duties of the Finance Committee, the bank signatories and their duties, cash receipts and payment, how cheque payments were administered, transport tariffs, hiring of assets, handling of petty cash, budget procedures and financial reporting. The bank signatories at this school were the SGB chairperson, treasurer, and principal. In School B, the bank signatories were the SGB treasurer, secretary, and vice-chairperson. The policy stipulated the frequency of meetings, responsibilities of the petty cash officer, the finance officer and the treasurer, recording and banking of money, how expenditure was administered, and budgeting and financial irregularities. The finance policy for School C included responsibilities of the principal as the accounting manager, handling funds, safekeeping of money, cash donations, rentals, budgeting, administration of accounts, auditing and purchases. The policy did not indicate the Finance Committee and signatories for the bank account.

In school D, the finance policy had been developed regarding the following matters: fundraising, petty cash, travel and transport, claims, the use of telephone/photocopier/fax, banking and withdrawal of monies, budgeting, monitoring, and monitoring and reporting. The role of the Finance Committee was not indicated in the policy. In School E, the policy designated the Finance Committee and their responsibilities. It also covered claims by service providers, transport claims and tariffs, subsidies for learners' trips and catering for SGB meetings. At School F, the policy included the Finance Committee and its duties, policy regarding meetings, managing cash flow, petty-cash management, payment and authorisation, procurement, budgeting, preparation and reporting of financial statements and appointment of auditors.

5.9.5 Procurement Policy

The procurement policy was available at all six secondary schools. In School A, procurement is done through tender and quotations. The Finance Committee is responsible for requesting quotations or inviting tenders. Procurement processes at

School B are done according to the “Revised Prescripts for the management of school funds in Public Schools”, as stated in their policy. At School C, the policy included purchases or services without quotations, purchases or services using quotations and purchases and services per tender. In school D, procurement was done through quotations, and the Finance Committee served as a bid adjudication committee and recommended the appointment of service providers. The Finance Committee is responsible for appointing service providers through three quotations in School E. They met to adjudicate the quotations in a meeting and appointed a service provider. At School F, all procurement is done through three quotations, and the Finance Committee served as a bid adjudication committee and recommended the appointment of service providers. The procurement policy in five schools was part of their fiscal policies, except for School A, which had a separate and isolated policy.

5.9.6 Fundraising Policy

Schools A, B, C and D produced their policies, unlike Schools E and F, which had none. The fundraising policy in School A covered the fundraising committee, sources of funds, fundraising procedures, responsibility and accountability directives, and partnerships and collaborations. At School B, the policy explained how the SGB and the principal are involved in fundraising by engaging the community through different activities. These include music events, photographs, stationery orders, tuck-shop, market day, cake sales and application of funds for major projects. Fundraising in School C was done through learners by engaging their parents in different activities and was part of the finance policy. The policy did not indicate specific activities in which the school did fundraising. In school D, the fundraising policy is part of the finance policy. The SGB, through the fundraising committee, planned different activities, such as casual days, market days and recycling. The fundraising committee developed a school business plan through which they targeted different companies and donors.

5.9.7 Assets and Maintenance Policy

At School A, an assets policy was available. It included guidelines on the School Assets Management Committee, management of school assets, assets movement register, use of the school property by the community, stock-taking, maintenance of assets and disposal of assets. The asset register was kept for all the school's assets. It indicated the date obtained, donated, disposed of, supplier or retailer, cost, condition, where it was kept and the teacher responsible for the assets. In school B, the policy indicated the date of acquisition, order number, invoice number, make and model number, serial number, purchase cost, disposal information and date and details of disposal. In school D, the policy showed the roles and responsibilities of the SGB infrastructure committee, the responsibilities of the infrastructure coordinator, events and projects allowed on the school premises, access to the school, schedule of activities, use of the school facilities by the teachers, learners, support staff and local community, and penalties associated with the utilisation of school facilities. There was a maintenance plan for School F, and it covered the repair and installation of the ceilings, repair of the school fence, broken windows, ablution facilities, chalkboards, and broken tiles. However, the researcher found no maintenance policy at Schools C and E.

5.9.8 Learning and Teaching Support Materials (LTSM) Policy

The policy in School A showed how the school supplies learners with stationery and the learning materials parents were expected to buy. Textbooks were returned to school for use by incoming learners in the grade the following year. Retrieval of books, what happens if a learner fails to return a book and the provision for books that might not be found in bookshops, were in the policy. At School B, the policy addressed the following key aspects: stationery and supplies, learning materials, resource provisioning, accountability, ordering, receiving, recording and safekeeping, issuing of LTSM, inventory checks, LTSM audit, recordkeeping and reporting, disposal process, retrieval process and, lost and replacement of textbooks. Schools C, D, E and F had no LTSM policy.

5.9.9 Learning and Teaching Support Materials Register

None of the six schools produced an LTSM register, which indicated that LTSM is not effectively and efficiently managed. Schools A, B and F produced loose sheets with records of the available textbooks. There was no consistency in how LTSM was recorded, distributed and retrieved. In School A, the information showing how the records were kept, with complete information, was unavailable. In Schools C, D and E, the researcher did not access the registers, as they were unavailable when requested.

5.10 SUMMARY

This chapter was on data presentation and analysis of research findings. Data collected through interviews, observations and document analysis were categorised into themes and sub-themes. The next chapter discusses the research findings related to the theoretical framework and literature, as reviewed in Chapters 2 and 3.

CHAPTER SIX

DISCUSSION OF RESEARCH FINDINGS

6.1 INTRODUCTION

The previous chapter presented the research findings from the interviews, triangulated with data from non-participant observation and analysis of documents. Data analysis also presented the themes and sub-themes, which helped answer the research questions. This chapter discusses the research findings relating to the theoretical framework and the literature that underpins the study. The responses from the interview participants and data from observations and document analysis are discussed in detail.

6.2 RESEARCH AIM AND QUESTIONS

This study aimed to examine how quality education can be advanced through the national funding model in a rural South African context.

The main research question for this study was:

How can quality education be advanced through the national funding model in a rural South African context?

The secondary research questions were as follows:

- How is the national funding model implemented to advance quality education in rural public schools?
- What challenges do schools in rural communities face in implementing the national funding model to ensure quality education?
- How do rural school principals and School Governing Bodies address challenges emerging from the management of state-allocated funding to ensure quality education?

- How are the educational resources used to advance quality education in rural public schools?
- Which possible funding model can be used to address the challenges of advancing quality education through national school funding in rural South African schools?

6.3 DISCUSSION OF FINDINGS

The discussion of research findings is aimed at addressing the preceding questions. The findings are discussed with the support of the literature relevant to the research topic. The researcher discusses the themes by referring to the literature to confirm or disapprove the findings. The discussion unfolds according to the main findings of the study. The topics are as follows: The implementation of the national funding model to advance quality education in rural public schools; The challenges rural schools face in the implementation of the national funding model to ensure quality education; Addressing the challenges emerging from the management of state-allocated funding by rural schools' principals and School Governing Bodies to ensure quality education; Advancing quality education through educational resource in rural public schools, and the proposed funding model to address the challenges encountered in advancing quality education through the national school funding in rural South African schools. The discussion of the findings of this study is presented below by theme.

6.3.1 The implementation of the national funding model to advance quality education in rural public schools

The following four sub-themes were identified under this theme: budget planning, budget implementation, monitoring and control of school finances, and structures and systems. These sub-themes are discussed in the following paragraphs.

During the interviews, school principals explained that budget planning is essential to managing state-allocated funding. They argued that the budget to follow departmental directives and involve all stakeholders, such as the SGB, teachers and parents, should

be a collective product that prioritises the school's needs. This finding concurs with Section 38 of SASA (RSA, 1996b), which states that the draft budget is to be prepared according to the directives of the Member of the Executive Council (MEC) and presented to parents' meetings for approval. The finding also concurs with Marishane and Botha (2004). They found that knowledge of the main budgetary items is significant in budget planning to allocate funds to the different communities' needs. Chukwu et al. (2019) added that budgeting is the financial planning required to guide the activities of the principal and the School Management Team (SMT) towards achieving the educational goals in a particular year. The current researcher believes proper budgeting and adherence to departmental directives can realise the school's needs. Budgeting implies that FINCOM and SGB must have the necessary expertise to prepare the school budget. This only is an estimation of the required funds to attain educational goals and objectives.

The second aspect reported by the participants under this theme was budget implementation. FINCOM members explained how they utilise the state-allocated funding according to the approved budgets to advance quality education. The description of compliance with proper procurement policies and processes was achieved by seeking three quotations. The finding in the current study is consistent with Marishane & Botha's (2004) finding that the SGB matches the resources with the set goals, as listed in the approved annual budget. The finding also concurs with the Limpopo Department of Education (2021), which states that the minimum standard requirement for the distribution and utilisation of the norms and standards funds allocations at schools should be as follows: curriculum 60%; administrative expenses, a minimum of 10%; sports 10%; transport 5% and the remaining 15% be allocated to COVID-19-related expenses, which is a makeshift arrangement subject to annual review. The current study finding is also in line with the study by Junge, Bosire and Kamau (2014), which contends that budget allocation and implementation concerns decentralising responsibilities to different stakeholders to alleviate conflicts amongst them in advancing quality education. The current research has found that -although schools try to adhere to the budget in utilising the state-allocated funding- they are sometimes forced to deviate from catering for

teaching and learning needs. This deviation involves the outsourcing of teachers. The deviation shows that -despite their non-compliance- it is in the best interest of the learners.

The third aspect of implementing the national funding model to advance quality education was monitoring and controlling school finances. The researcher found that one school had been put under administration by the district office due to allegations of financial mismanagement. In this school, things were done differently, as the district finance manager needed to come to the school to approve payments for the expenses incurred for each month. This finding is in line with the study conducted by Rangongo, Mohlakwana and Beckmann (2016), who found that financial mismanagement involved mainly poor management of school finances, corrupt behaviour and fraudulent use of funds. This finding also concurs with The New Age (2015), which reported that some challenges faced by SGBs are corruption and financial mismanagement. For example, in August 2015, Glenvista High School in Gauteng was in the news for financial mismanagement at the school. Department officials' participants indicated that their primary focus was on whether schools were using state-allocated funding in terms of the departmental directives and the approved budgets. Another focus was whether schools do comply with AAFS. The finding on monitoring and controlling school finances concurs with Rangongo (2011), who defines financial control as a process which safeguards the appropriate use of finances for planned purposes. Financial monitoring and control further mean a process that guarantees financial plans are fruitfully executed to achieve the educational objectives (De Bruin, 2014). As defined by Kennedy (2011), budget control is a measure that allows schools to track what has been disbursed and assists schools against financial risks. For the current researcher, this finding and the literature emphasise that monitoring and control involve a system that incorporates how finances are distributed, bank accounts are maintained, and funds are spent.

The fourth aspect involves structures and systems. FINCOMs were performing their financial obligations as expected as directed by the directives for managing and administrating school funds in public schools of Limpopo province. FINCOMs were having monthly meetings to look at purchases, reporting to SGBs on finances, getting quotations from the procurement committees, recommending service providers to the SGBs,

checking that monthly expenditure is in line with the budget, reconciling monthly financial statements, sending financial reports to the circuit office, applying financial policy, auditing financial books at the end of the year and reporting to parents. This finding on structures and systems concurs with Makrwede (2012), who asserts that the Finance Committee assists the SGB on financial matters. It is to develop and implement financial policy, monitor and approve all expenditures and ensure that procurement processes follow the correct quotation and tendering procedures. However, exceptions were found, wherein two school principals indicated that they give financial reports to parents quarterly. One of the two school principals also indicated that FINCOM is the same as the SGB, except that the treasurer becomes the chairperson. This finding is inconsistent with the Limpopo Department of Education (LDoE) (2021) regulation that the principal must establish FINCOM, comprising the SGB deputy chairperson, treasurer, finance officer and a co-opted member with financial expertise. The finding on quarterly reporting to parents is also inconsistent with the LDoE directives, which state that the SGB should annually present financial statements to the parents meeting no later than 31 March of the year.

6.3.2 The challenges that rural schools face in the implementation of the national funding model to ensure quality education

Four sub-themes discussed in this theme are insufficient funding, safety and security, the capacity of the SGBs and the utilisation of state-allocated funding. The following paragraphs cite the literature on these issues.

Participants raised concerns regarding insufficient state-allocated funding, which prevented them from acquiring the teaching and learning materials required for their schools. The situation was worsened by the parents of the learners, who were poor and could not afford to assist the school financially. This finding is inconsistent with Brown & Swanson (2003). They assert that education needs substantial investment in which the advancement of a country is determined by human resources growth, to which education investments contribute significantly. Lewin (2004) asserts that every learner in rural communities must benefit from quality basic education to promote rural South African schools. The failure of education policies and laws to guarantee the realisation of

education rights for many citizens of South Africa, including rural communities, remains a challenge. Bryant (2010) concurs that one of the leading education challenges in rural schools is ignorance by the government to take care of the prevailing conditions that negatively affect education quality. Therefore, the researcher believes that most rural schools provide poor-quality education. This is because many parents cannot invest in their children's education, and the government does not pay particular attention to these schools.

At all the research sites, participants expressed concern about the theft and burglaries regularly occurring in their schools due to lack of security. They reported how vandalism and crime affect them financially and bemoaned the amounts used for fixing or replacing damaged or stolen property. This finding concurs with Boychuk (2014), Shaw (2004), and Syrjalainen et al. (2015) that school safety can promote health or physical security rather than the creation and maintenance of the safety of the entire school. Similarly, Xaba (2014) asserts that school security and creating safe conditions include maintaining the school facilities and ensuring the whole school is continuously monitored. Diaz-Vicario (2017) argues that school safety for structural components, such as buildings, furniture and equipment, was necessary, and so were non-structural components such as human resources, teaching and learning activities, and school-community relations. Safety and security have been a big concern in rural schools. Schools must therefore be always secure and safe.

The participants also reported the challenges that they have with SGBs. They complained that SGBs could not execute governance functions. They also mentioned challenges such as low literacy levels, little understanding of governance matters, pursuing financial benefits, and little interest in school matters. This finding is in line with Maile (2002). She contends that illiteracy amongst SGB parent members might contribute to their incompetence, preventing them from getting and understanding appropriate information that concerns their functions. Van Wyk (2004) also found that many SGBs in disadvantaged areas lack the essential experience and skills to execute their governance functions. In one study, Xaba (2004) found that SGB capacity is made difficult by how they are elected to the positions; that is, in most cases, through community-based

support. This makes it difficult for them to promote the school's best interests. However, schools must be governed. Building capacity for SGB members is essential so that they can address governance matters at schools. This lack of the required governance capacity clearly shows that SGBs at these schools will continue experiencing difficulties if they are not empowered.

The researcher also found that schools have strict restrictions on how to use the state-allocated funding. Despite the prescribed restrictions, the rural schools sampled were sometimes forced to use the state-allocated funding to pay for the teachers they were outsourcing to advance quality education in the subjects that did not have teachers or lacked competent teachers. This finding contradicts Clarke (2008) that efficient use of financial resources allows schools to gain more assets cost-effectively that contribute to quality education. Marishane (2013) also indicates that schools should use funds efficiently to improve and create effective teaching and learning conditions. For this reason, SGBs must be allowed to spend school funds prudently. Bisschoff and Mestry (2009) argue that achieving value for money requires constant budget monitoring and prioritising educational objectives. The current researcher believes that strict adherence to the budget will ensure that SGBs are economical in their spending. This finding revealed that budgets are developed for compliance purposes but are not efficient. Therefore, there needs to be some flexibility in the spending rules.

6.3.3 Addressing the challenges emerging from the management of state-allocated funding by rural schools' principals and School Governing Bodies, to ensure quality education

Under this theme, two sub-themes emerged that described the strategies to address the management of state-allocated funding to ensure quality education. These were fundraising and donations and training and workshops.

The researcher found that SGBs in rural schools find it very difficult to raise funds and solicit donations. The situation at these schools is worsened because the Department does not allow them to charge parents school fees. Therefore, they have fewer effective

means of raising additional funds to augment the state-allocated funding. As a result, rural schools cannot afford the many teaching and learning materials they need and consider their situation unfair compared to urban schools. Inadequate state funding in most rural schools emphasises the need for alternative fundraising measures. Thus, SGBs must consider advanced fundraising measures to augment the funds they receive from the government. Fundraising is defined by Kelly (1998) as the measures assisting charitable establishments in finding funds and donations that contribute to the organisation's welfare and society. SGBs are responsible for being involved in different innovative fundraising measures, including selling advertising rights on school property and ensuring that financial support for school activities is widely created (Blake & Mestry, 2014). Partnerships between schools and service providers can include various services, such as professional services, management services, education services, support services, operational services and availability of facilities. In her study, Blake (2008) suggests that school principals and SGBs should establish an entrepreneurial position in managing school finances. This is because sound management of resources plays a significant role in a school's success. Thus, entrepreneurial leadership to solicit adequate funding for school needs is essential to improving the school's performance.

Participants shared similar sentiments concerning workshops to empower them on financial management duties and compliance with the prescripts on managing school funds. However, these workshops are not held regularly but occasionally. One Departmental official indicated that they had planned to train all the schools within the district during the year 2021. He also indicated that their main target was schooling with massive enrolment, as they often deviated from their planned budgets when utilising state-allocated funding. Another challenge cited was SGBs who joined the body or their financial interests in the procurement processes to enrich themselves. This finding concurs with Brown and Duke's (2008) observation that capacity-building training helps SGBs with baseline knowledge of school governance. Training assists SGBs with the relevant school governance knowledge, enabling them to execute their responsibilities confidently. It is important to note that even knowledgeable and skilled governors need more capacity building (Quan-Baffour, 2006). On-going capacity-building training is

necessary because it capacitates SGBs on improving quality education in schools (Chaka, 2005). The researcher believes that SGB training should always be regarded as the foundation of school governance.

6.3.4 Advancing quality education through educational resources in rural public schools

Four sub-themes were related to advancing quality education through educational resources in rural public schools. The sub-themes were: availability of educational resources, procurement of educational resources, the impact of educational resources on learner performance, and lack of educational resources. These sub-themes are discussed below, in line with the relevant literature on the central theme.

Participants across this sub-theme mentioned the available educational resources at their schools. According to them, the educational resources that contributed to improved performance were laptops, photocopiers, textbooks, printers and Wi-Fi. One participant from a small school indicated that they had a borehole that provides water, electricity and enough toilets and classrooms. In one school with a high enrolment, a participant indicated that they have duplicating machines, Wi-Fi, a library and a laboratory. She further mentioned that they have quality teachers in English, Mathematics Literacy and Commerce, and extra-mural activities, such as music and debate. This finding concurs with Akisanya (2010), who contends that educational resources are vital because schools depend on adequate availability and use of educational resources to enhance quality teaching and learning. This finding is also supported by Adeoye and Papoola (2011). They assert - for learning to be successful- learners need to have essential education materials and resources to ensure a high level of performance. The finding also concurs with Mutai ((2006), who stresses that learning is supported when sufficient educational resources, such as textbooks, exercise books, teaching aids and classrooms, promote academic excellence. For the current researcher, this implies that the necessary educational resources must be organised and used effectively to achieve the educational goals.

Commonly, the researcher found that procurement of educational resources, particularly electronic devices, plays a significant role in promoting quality teaching and learning. While some schools have bought or received educational devices such as laptops, interactive boards, photocopiers and Wi-Fi, they still struggle financially to acquire other resources. They used state-allocated funding to buy educational resources and sought donations from big companies, such as Cell C and MTN. At one school, a participant indicated that they even entered credit agreements to buy educational resources. However, they sometimes struggled to honour their payment agreement with the creditors.

Furthermore, schools in rural areas still lag in terms of educational resources, mainly Information and Communication Technology (ICT). This made it difficult for them to achieve equity in these types of schools. This finding is inconsistent with Mirzajani, Mahmud, Ayub, and Wong (2016), who observed that teachers are discouraged from integrating ICT in teaching and learning in disadvantaged situations. However, the Gauteng Provincial Education Department authorised and incorporated the ICT integration initiative to make teaching and learning more accessible and exciting for every learner through ICT tools (Odendaal, 2017). Similarly, Denoon-Stevens and Ramaila (2018) observed that the procurement of ICT facilities, particularly in disadvantaged areas, is likely to advance social capital and empower communities. Nevertheless, achieving this dream seems elusive, as rural schools are endlessly deprived of ICT resources.

The participants' responses were similar concerning the educative role teaching and learning resources play in improving learners' performance. It emerged from their responses that using educational resources enhances teaching and learning activities and arouses the learners' interest. Devices such as overhead projectors were used to demonstrate learning content to the learners. Their responses showed that they need additional resources to improve learners' results. However, one principal expressed a different view of appointing the best teachers by stating that he headhunts teachers based on the school's need to have competent teachers and achieve good results. According to Khan and Iqbal (2012), adequate school facilities are the main elements of quality

education to achieve the planned educational goals. According to Adeyemi and Igbineweka (2000) and Saeed and Wain (2011), buildings, classrooms, libraries, laboratories, recreational equipment, furniture such as desks and chairs, and apparatus contribute to academic achievement.

Furthermore, O'Neill (2000) asserts that school facilities influence academic achievement, attendance and teacher retention. Akungu's (2014) study on the effects of instructional resources on learners' performance in West Africa School Certificate Examinations (WASCE) found that learners' performance in WASCE was positively related to the available resources for teaching and learning. He concluded that educational resources substantially affect learners' performance, as they simplify the learning of abstract concepts and ideas and discourage rote learning.

The findings also revealed that participants still face severe challenges relating to the shortage of educational resources. Another finding is that a culture of teaching and learning grounded on adequate educational resources is still a challenge in rural schools. It was found that these schools do not have computer rooms, laboratories and libraries. Furthermore, some schools, especially small schools, still have a shortage of teachers. This finding is aligned with Mosha (2014), who acknowledges that the quality of education in secondary school cannot be detached from the setting and circumstances that exist in schools. In Tanzania, many secondary schools with a shortage of teaching and learning materials were understaffed, under-qualified and demoralised (Komba & Nkumbi, 2008). In support of this finding, the Association for the Development of Education in Africa (ADEA) (2003) points out that an adequate supply of teaching materials enhances the teaching and learning process. Therefore, schools with enough infrastructure, laboratories, electricity, water and ablution facilities provide a comfortable and conducive environment for learning. Hakielimu (2008) and Laddunuri (2012) concur with ADEA (2003) that many secondary schools have a severe shortage of teaching and learning materials, such as textbooks, classrooms and laboratory equipment. This is because of inadequate funding from the government, which limits improved academic success.

6.3.5 The proposed funding model to address the challenges encountered in advancing quality education through the national school funding in rural South African schools

The discussion in this theme covers the following four sub-themes: the funding model, lack of safety and security in schools, infrastructure and resources, and financial responsibility and accountability. These sub-themes are discussed as follows.

The interviews revealed that the current funding model provides inadequate funding to rural schools. State-allocated funding does not meet the demands of these schools. Due to the regularisation of these funds, these schools sometimes contravene the prescripts on managing funds to meet their needs, such as payment of outsourced teachers. One participant indicated that the criteria used to determine state-allocated funding are unfair, as they do not look at the school's needs but rather the number of learners. Another response was that the budget's existence in terms of the allocation of percentages, as required by the Department, is for compliance. This is because schools find it challenging to implement them as planned. Generally, the participants believed that the Department should allocate funding to schools differently, looking at their needs. Another response was that the Department should allocate funding based on the submitted budgets to close the gap between rich and poor schools. Another challenge, as reported by the participants, was that funding is not inflation related.

Another complaint from the participants was that there were too many restrictions. They felt that the prescripts for utilising the state-allocated funding should be relaxed. The issue of consulting SGBs, to provide their input on the funding model was also expressed. This finding concurs with Mestry & Ndhlovu (2014), who found that the changes in the NNSSF policy have undoubtedly put much stress on SGBs, SMTs, teachers and district officials, causing a substantial disconnection between policy intentions and practice. These changes significantly impacted what the government wants schools to do and what schools can do. Hence, while the government's intentions to address equity and Social

Justice are commendable, there is still much that needs to be done in realising quality education, particularly for the disadvantaged and marginalised schools.

Furthermore, many schools in poor rural communities still face the challenges of large classes, bad physical conditions and rampant unavailability of learning resources despite the Reconstruction and Development Programme (RDP), the National School Building Programme and many other development plans paid for by provincial budgets (Chisholm, 2005). Until recently, teachers and learners in poor schools were expected to attain the same levels of teaching and learning as their counterparts in affluent schools. Such inconsistencies within the same education system undoubtedly mirror previous models' discriminatory investment and massive inequalities in individual parents' income (Ndimande, 2006).

The researcher has found a common safety and security problem in many rural schools. Participants complained that their schools are easy targets for burglars. The interviews revealed that the funds meant for teaching and learning were also being used for repairs at school. The participants expected that if the Department could not provide them with security personnel, they should give schools additional money to appoint security personnel or allow them to use the state allocated funding for such purposes.

The participants also indicated that the Department ensures they are provided with computer centres, water and sanitation, and internet connectivity. Another expectation was that if the Department could not provide each school with a laboratory and a library, they should build central laboratories and libraries, for use by a cluster of schools, following a planned schedule. The findings concur that many rural schools were poverty-stricken and lacked infrastructure and resources regarding instructional materials, human resources and facilities (Ncube, 2013). Similarly, efforts taken by the SGBs to provide resources were not always possible because of low educational levels and many poor parents in rural communities (Van der Merwe, 2011), which led to poor learner performance (Lingam, 2012). The shortage of human resources resulted from low retention of competent teachers in rural schools (Aziz, 2011). This weakened learning success due to poor teacher quality (Darling-Hammond, 2003; Shadrack, 2012).

Therefore, rural schools lacked the required resources. These include teachers, infrastructure and instructional materials. Despite the impact of these issues, quality education at under-resourced rural schools can still be achieved, by encouraging solid links with the parents, to mobilise resources needed for quality teaching and learning (Van der Merwe, 2011). Teachers are responsible for making the communities they serve aware of the value of education and devise plans for how stakeholders can work together to get adequate resources for effective teaching and learning at rural schools.

In this sub-theme, the findings were that the Department mainly monitors how SGBs act responsibly and are accountable for the state-allocated funding. The responses indicated that SGBs could do as they wished in spending these monies, as they were not subjected to any corrective actions for deviation from the rules. Other challenges the participants mentioned were illiterate SGBs who struggled with their financial responsibilities in managing school funds. This situation was worsened by the shortage of departmental officials who were supposed to empower SGBs. When some departmental officials lacked resources, such as laptops, it was difficult for them to produce reports on their duties. The participants further cited challenges such as lack of capacity by departmental governance officials, insufficient SGBs training time and small schools struggling with their finances, as much of their budget went to transport. Another complaint was that some SGBs connived with external auditors to issue audit reports that were not a true reflection of how monies were spent. This finding is consistent with Bush et al. (2006), who found that illiteracy, lack of experience and SGBs were responsible for poor financial responsibility and accountability at schools. The finding is inconsistent with Joubert (2009), who found that, despite the training by the Department of Education, financial responsibility and accountability remain a challenge at many schools. Considering the reasons above, it can be concluded that lack of training, illiteracy among SGBs and unethical practices by some school officials are responsible for the lack of responsibility and accountability at schools. Additionally, it can be concluded that poor training and monitoring in applying accountability practices by the Departmental officials (Dieltiens, 2005; Mestry, 2006) lead to this situation.

6.4 SUMMARY

This chapter discussed the research findings and compared them to the theoretical framework and the literature underpinning the study. The research findings were discussed to determine whether they confirm or contradict the theoretical framework or the reviewed literature. The next chapter presents the proposed funding model to advance quality education in rural South Africa.

CHAPTER SEVEN

PROPOSED FUNDING MODEL FOR ADVANCING QUALITY EDUCATION IN RURAL SOUTH AFRICAN SCHOOLS

7.1 INTRODUCTION

The previous chapter discussed the research findings. It also compared the findings to the theoretical framework and the reviewed literature underpinning this study. The findings were compared to determine whether they supported the theoretical framework or the reviewed literature. This chapter presents the proposed funding model for advancing quality education in South African rural schools.

7.2 THE PROPOSED FUNDING MODEL

Figure 7.1 shows the proposed national school funding model for advancing quality education in rural South African schools. The dimensions illustrated in the model show what is required of the state to develop new funding systems for school funding, to deliver quality education. The model addresses the six key dimensions that the Department of Education and Provincial Education Departments cannot meet. This is because the expected expenditure in terms of the different needs is usually insufficient to meet the actual needs of the school. The six dimensions in the model are governance, curriculum delivery, human resources provisioning, professional development, infrastructure, safety, and security. This model aims to close the gap between rich and poor schools by considering the six dimensions. When linked together, these dimensions can lead to quality education. Despite the state's attempt to ensure equality and Social Justice through the NNSSF, most rural schools still cannot achieve quality education. This is mainly due to insufficient resources in poor schools. Quality education is of critical importance when discussing this funding model.

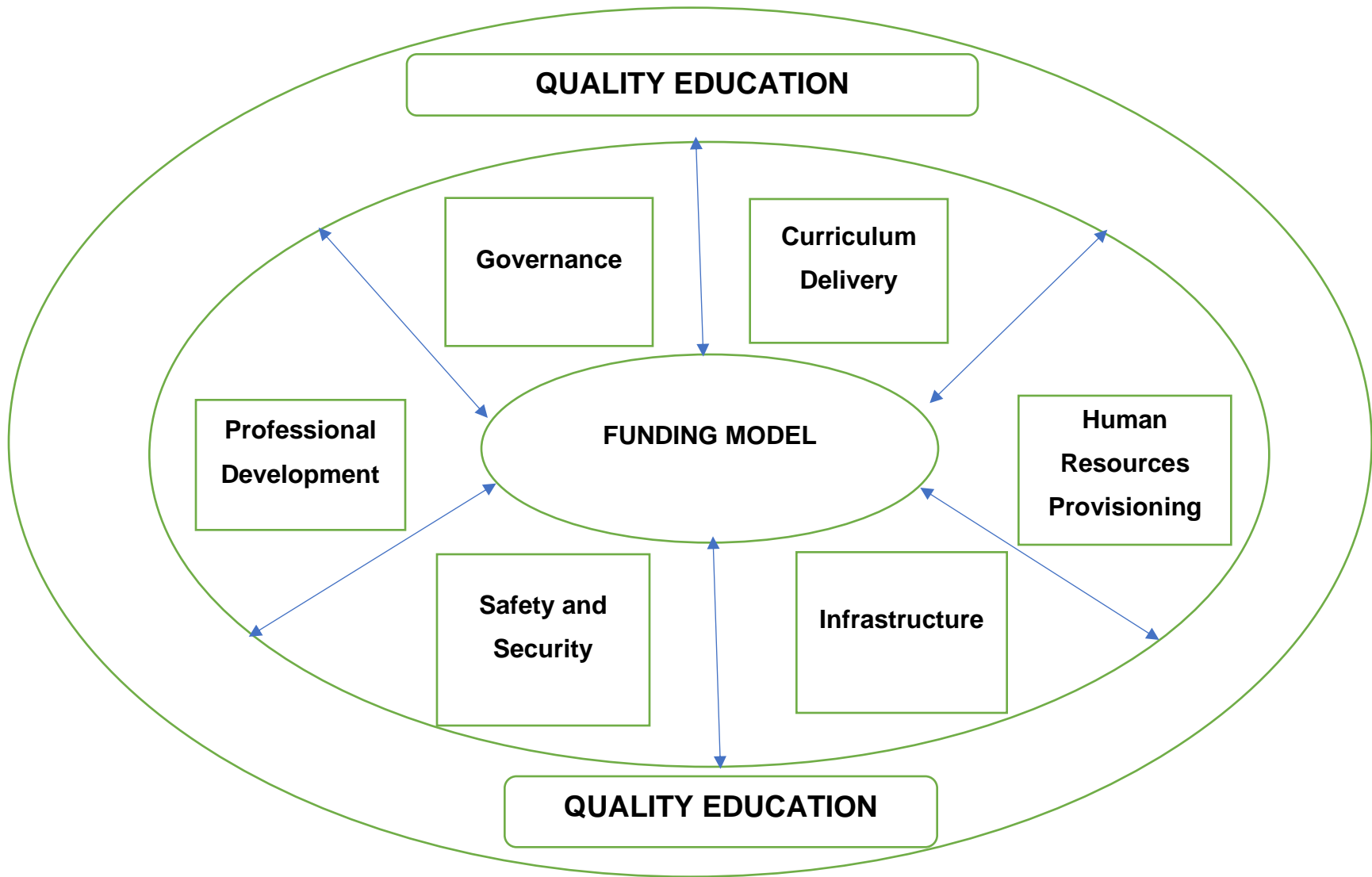


Figure 7.1: School funding model for advancing quality education in a rural South African context

7.2.1 Components of the Funding Model

This chapter discusses how school funding impacts the delivery of quality education in rural South African schools, as funding is a challenge in most rural schools. The state must ensure that the funding to rural schools meets their needs. Ross (2002) contends that quality education demands the state to adequately allocate human, physical and financial resources. Furthermore, the state must continuously monitor how quality education is provided to satisfy the different school needs. Okendu (2012) advises that educational authorities must provide human and physical resources within the schooling system for effective curriculum delivery. Thus, the state must provide sufficient funding to cater to the different school needs and supply essential resources necessary to deliver quality education. States are also responsible for ensuring effectiveness and efficiency within and outside schools in procuring resources, their organisation, coordination, maintenance and control (Usman, 2016). Therefore, the state should provide adequate human, physical and financial resources, considering the varying contexts. This approach will assist in closing the economic inequalities between rich and poor schools. The proposed funding model aims to ensure equal access to real educational opportunities that promote quality education, as insufficient funding for the poor will deprive them of quality education.

7.2.2 Quality Education

In the current study context, quality education implies creating opportunities that eliminate discrimination and promote socio-economic rights. The proposed funding model attempts to provide solutions to address problems of inequality and inequity to facilitate the delivery of quality education in rural schools. According to Hoy, Bayne-Jardine and Wood (2000), quality in education refers to an assessment of the education process, which improves the achievement and development of the clients' talents and reaches the set accountability standards by the clients who spent for the outputs in the education process. In this context, quality education includes availing human and physical resources for teaching, facilitating teaching quality and improving the results. Rural schools are not the

same as urban schools. This is because rural schools encounter some challenges and hardships. Inequalities still characterise the quality of education at these schools because of the context in which they find themselves. These schools also face poverty issues and receive insufficient funding. UNICEF (2005) asserts that quality education encompasses five key elements: learners, learning content, context, processes, and outcomes, which all impact the number of schools, learning materials, competent teachers, and the children who complete the schooling cycle. UNICEF stresses that education must cover human security to ensure community development and national progress. In the context of the current study, quality education concerning the proposed funding model is discussed in the research findings, focusing on governance, curriculum delivery, human resource provisioning, professional development, infrastructure, safety, and safety security.

7.2.2.1 Governance

The data collected highlighted that SGBs have several challenges in governance matters. Research also notes the incapacity of SGB members to run their functions as specified by SASA (Mestry, 2004; Chaka, 2005). Therefore, SGB members must be trained in governance matters to empower them to perform their expected functions. The training of SGBs should be regarded as the pillar of school governance. Departmental officials are expected to conduct ongoing training of SGBs because it empowers SGBs regarding school governance. Training also promotes the advancement of quality education for all learners. However, in rural schools, most of the SGBs are illiterate. This suggests that SGB training should be in their home language, rather than English, as they find it difficult to understand (Van Wyk, 2004). Such training will equip them with the necessary governance skills, such as budgeting, monitoring and controlling school finances, financial responsibility and accountability, and fundraising measures.

This model also includes the appointment of Deputy Manager: Governance at different circuits in Limpopo Province. The findings revealed that some government officials could not execute their appointed employment obligations. Competent and skilled officials need to be appointed to these positions so the schools get the necessary support in their diverse contexts. Furthermore, proper appointment processes must be followed in hiring

governance officials. The Department should also provide capacity for these governance officials on an ongoing basis to keep track of the latest developments in governance matters.

7.2.2.2 Curriculum Delivery

The data collected revealed that even after rural schools have bought and secured donations for educational resources, they still find it challenging to acquire all the necessary resources. Rural schools are lagging in terms of educational resources, including ICT, making it difficult for them to achieve quality education. This is because digital teaching arouses learners' interest in the learning process and helps learners participate actively in attaining the intended learning objectives (Pai & Tu, 2011). Educational resources include printed resources such as textbooks, study guides, reference books and electronic resources such as laptops, tablets, printers, smartboards, projectors and photocopiers, which are used in the classroom and made available in the libraries. Pai and Tu (2011) contend that the teaching strategies and digital learning tools are the main issues in the present information-technology-integrated education. Unfortunately, rural schools are experiencing a scarcity of physical and electronic educational resources. However, the situation is worse with ICT resources, which negatively impacts the quality of education of the learners.

On the other hand, urban schools are advantaged, as they have most of the basic needs, such as water, electricity, adequate learning facilities and resources, and computers and internet connectivity. According to Mlitwa (2006), effective use of ICT contributes to improved education quality. It can be used for computer-aided learning (e-learning) to help learners access technology-embedded practices, despite the diverse locations where learners are located.

7.2.2.3 Human Resources Provisioning

Rural schools also experience challenges in securing qualified teachers. This challenge leads to learners failing to achieve a quality education. Although the state is concerned with teacher supply and development issues, the focus seems to be more on urban

schools than rural ones. As a result, rural schools are adversely affected by the insufficient supply of qualified teachers and ineffective teacher development programmes. These are required to empower teachers, helping them to acquire the desired knowledge and skills (Du Plessis & Mestry, 2019). To address the challenge of recruiting and appointing qualified teachers in rural schools, the state to invest significantly in human resources by providing incentives for these teachers. To mitigate this situation further, the state should focus on teacher development by appointing specialists from non-government organisations (NGOs) and Higher Education Institutions (HEIs). They can provide teacher development training for teachers working in rural schools. It is also challenging for rural South African schools to attract qualified teachers due to a lack of incentives. Brown and Swanson (2003) expressed that a model rural teacher must be able to teach multiple subjects or grades, be responsible for extra-curricular activities and adapt to the rural context.

This model also incorporates the Presidential Youth Employment Intervention (PYEI), a project initiated by the President of South Africa, the Honourable Cyril Ramaphosa and implemented as a Basic Education Employment Initiative (BEEI) in public schools. It is aimed at providing the youth with employment opportunities. The initiative places Education Assistants (EAs) and General School Assistants (GSAs) in public schools to help schools acquire the capacity to manage the impact of COVID-19 on schooling. The present researcher's model incorporates this initiative as a permanent solution to the Basic Education Sector, beyond the COVID-19 era, to build better capacity in bringing efficiency and effectiveness to schools. The provision of GSAs has significantly impacted financially disadvantaged schools, such as rural ones. For example, there is support for priority subjects such as Mathematics, Science and Technology (MST), and Reading and Literacy. The initiative also supports teachers in classrooms, reading initiatives in schools and communities, e-cadres to address the vast digital divide and integrates ICT usage in classrooms and provides psychosocial support to learners through the provision of Child and Youth Care Workers (CYCW) as well as ensuring that extracurricular activities are supported in schools through Sport and Enrichment Assistants (SEAs). GSAs also act as handymen to ensure that schools provide a safe and conducive learning environment and

adhere to COVID-19 protocols by maintaining infrastructure, cleaning school surroundings, screening and sanitising learners and teachers and visitors to schools (LDoE, 2021b).

7.2.2.4 Professional Development

There is still a vast digital divide in rural schools. The introduction of Information and Communication Technologies (ICT) seeks improved quality teaching and learning to advance quality education. ICT offers better opportunities to redress past inequalities, access learning, and improve quality teaching and learning. However, the teachers' professional development needs in ICT are not addressed meaningfully and systematically, despite the teachers' need to be empowered in ICT skills. According to Kalogiannakis (2010), ICT fundamentally changes the teachers' role, as the use of ICT is becoming part of everyday life in schools. Therefore, the DBE and the PEDs need to introduce ICT professional development effective programmes to improve teaching and learning in rural schools. The researcher believes the implementation must combine with meaningful ICT teacher professional development to transform teaching and learning activities in rural public schools through ICT. Currently, few ICT devices represent inconsistencies in what is likely to be achieved with digital technology in schools (Olofsson, Lindberg, Fransson, & Hauge, 2011).

7.2.2.5 Infrastructure

Infrastructure is still a significant challenge in rural schools. Here infrastructure covers the physical teaching and learning environment. This study refers to functional classrooms, well-equipped laboratories, libraries, computer centres, internet connectivity, water and sanitation, and electricity. School infrastructure contributes to quality education (Marishane, 2013). Schools with adequate infrastructure provide learners with better access to education and play an important role in curriculum delivery. Infrastructure is an essential element of the teaching and learning context, enabling teachers and learners to access various resources. For example, computers are helpful for teaching, learning and administrative purposes. However, the unavailability of electricity renders ICT useless in

such a setting. Therefore, the shortage or scarcity of resources is critical in education, as it may adversely affect teaching and learning activities. Lack of resources and facilities is also directly related to learners' academic failure (Khumalo & Mji, 2014). The factors influencing academic success among rural learners revolve around poor infrastructure, which does not support quality academic discourse. Therefore, rural teachers work in conditions with limited resources, which results in frustration. This situation implies that learning may rely only on what the teachers impart to learners. Learners in rural schools are also left disadvantaged, as they do not have good libraries and internet connectivity. Furthermore, they find it difficult to discover information and ideas for themselves due to the scarcity of resources (Khumalo & Mji, 2014). Essentially, this implies that the performance of teachers and learners depends mainly on a conducive and positive classroom atmosphere. Both human and physical resources are essential, as they mirror the priorities, standards and targets that are to be set by a school.

7.2.2.6 Safety and Security

The school comprises human and material resources. Human resources are teaching and non-teaching staff. The material resources refer to facilities such as buildings, records and equipment in the school. These resources should be protected from any form of risk for the assurance of their durability and performance. Data for the current study revealed that rural schools are easy targets of crime, as there are regular break-ins at rural schools, and digital resources and other valuable materials are stolen. School security measures should reduce crime so that school property is safe and secured.

Several security measures should be taken for schools to be safe and secured. These include policy security measures, physical security measures, human security measures and technological security measures. The success of other security measures depends on the policies in place to control their usage and operations. For example, the policy can address school security and safety, state that no illegal activities will be allowed, and state the consequences for those who violate them (Jaarsveld, 2011). Physical security measures involve proper fencing, an effective locking system, strong rooms, burglar proofing, electronic equipment such as CCTV cameras, alarms, and a communication

system like an intercom. Human security measures involve the security functions carried out by security guards through walking around the premises, checking the activities that occur and the scenes where incidents can happen to detect any risks (Jaarsveld, 2011). Technological security measures use technical knowledge and devices to promote school safety and security. It includes using security technologies, such as CCTV surveillance systems, alarm systems, security gates and protective lighting in schools to decrease risks and crime experienced at schools. These security measures should be directed towards prevention, response and recovery.

7.3 SUMMARY

This chapter presented the proposed funding model to advance quality education in South African rural schools. It also discussed the new findings derived from the data collected. The next chapter, the last chapter, summarises the research findings, outlines the limitations and delimitations of this study, offers recommendations for the study, and provides recommendations for future research. Finally, the last chapter provides the conclusions.

CHAPTER EIGHT

REFLECTIVE SUMMARY OF THE RESEARCH FINDINGS, CONCLUSIONS, RECOMMENDATIONS, CONTRIBUTION TO KNOWLEDGE AND IMPLICATIONS FOR RESEARCH

8.1 INTRODUCTION

In the previous chapter, the researcher presented his proposed funding model for advancing quality education in rural South African schools. In this final chapter, the researcher summarises the study's findings, limitations and delimitations, recommendations for future research, and conclusions. This study attempted to answer the research question: "How can quality education be advanced through the national funding model in a rural South African context?" The secondary research questions were the following:

- How can the national funding model advance quality education in rural public schools in South Africa?
- What challenges do schools in rural communities face in implementing the national funding model to ensure quality education?
- How do rural school principals and School Governing Bodies address the challenges emerging from the management of state-allocated funding to ensure quality education?
- How are the educational resources used to advance quality education in rural public schools?
- Which funding model can be used/implemented to address the challenges of advancing quality education through national funding in rural South African schools?

8.2 SUMMARY OF RESEARCH FINDINGS

A summary of the research findings, conclusions and recommendations is presented below. The data was collected from the six sampled secondary schools through in-depth and focus group interviews, non-participant observations and document analysis. The research findings in the following paragraphs attempted to answer both the main research question and the secondary questions for the current study.

8.2.1 The implementation of the national funding model to advance quality education in rural public schools

School principals reported budget planning as significant in the management of state-allocated funding. In other words, the budget must comply with departmental directives and involve stakeholders such as the SGB, teachers and parents. This ensures that planning is a joint exercise prioritising the school's needs. The finding suggests that budgeting is a crucial stage in financial planning. It sets the tone for allocating funds, considering the different communities' needs. The present researcher accepts that effective budgeting and compliance with departmental directives facilitates the realisation of schools' needs. Therefore, the Finance Committee and SGB have the required financial skills.

The Finance Committee participants explained how they used the state-allocated funding to advance quality education according to their approved budgets. This finding implies that SGBs must match the resources with the planned objectives, as outlined in their approved budgets. The current researcher recognises the significance of stakeholders in budget planning. The researcher concurs that -although schools attempt to stick to the budget when using state-allocated funding- sometimes they are required to deviate from it to accommodate teaching and learning needs.

The researcher also found that one school was put under administration by the district office due to allegations of financial mismanagement. Financial activities were done differently at this school, as the district finance manager had to come to the school to approve payments for the monthly costs incurred. The researcher views financial

mismanagement as poor management of school finances, unethical behaviour and fraudulent use of funds. Department officials' participants indicated that their primary focus was on whether schools used the state-allocated funding in terms of the departmental directives and the approved budgets. For the current researcher, this finding and literature show that monitoring and controlling school finances includes a system that incorporates how finances are distributed, bank accounts are maintained, and funds are spent.

FINCOMs were executing their financial responsibilities per departmental directives for managing and administering school funds in public schools of Limpopo province. This finding is consistent with the literature that finance committees assist the SGB on finance matters, as it must develop and implement financial policy, monitor and approve all expenditures and ensure that procurement processes follow the correct quotation and tendering procedures. Exceptions were found where two school principals indicated that they gave financial reports to parents quarterly. One of these two school principals also indicated that Finance Committee is the same as SGB, but the treasurer becomes the chairperson of the Finance Committee. This finding contradicts the directives, which state that Finance Committee must be established by the principal, SGB deputy chairperson, treasurer, finance officer and a co-opted member with financial expertise.

8.2.2 Challenges that rural schools face in the implementation of the national funding model for advancing quality education

Participants complained that the state-allocated funding was insufficient, which made it difficult for rural schools to procure adequate teaching and learning materials. The situation at rural schools worsened because the parents were poor and unable to cater for the school financially. The researcher concurs that one of the primary education challenges in rural schools is ignorance on the part of the government to take care of the prevailing conditions that negatively affect the quality of education. Therefore, the current researcher believes that most rural schools provide poor quality of education because many parents cannot afford their children's education costs. Furthermore, the government marginalises these schools. The participants were concerned about their schools' regular theft and burglaries due to poor security. They lamented how crime negatively affects

them financially, as they had to use money intended for something else to repair/replace some resources. School safety and security include maintaining the school facilities and ensuring the whole school is continuously monitored. Safety and security are a formidable challenge in rural schools. Therefore, these schools must be prioritised in terms of security and safety.

The participants also complained about the SGBs' lack of capacity to execute governance functions. Participants cited challenges such as low literacy, inability to understand governance matters, and tendency to prioritise personal interests in school matters. The researcher believes that illiteracy amongst SGBs probably contributes to their ineffectiveness. In other words, illiteracy deprives them of the ability to access information that involves their responsibilities. Therefore, building capacity for SGB members is indispensable so that SGBs can address school governance matters. The lack of the required governance capacity implies that SGBs at these schools will continue experiencing difficulties impacting their children's education.

The researcher also found that schools have strict limitations on how to use the state-allocated funding. Despite the prescribed restrictions, some rural schools were sometimes forced to use the state-allocated funding to pay teachers they were outsourcing to advance quality education in the school. The current researcher believes that the efficient use of financial resources allows schools to acquire additional assets cost-effectively, contributing to the provision of quality education. The researcher also believes compliance with the budget will guarantee that SGBs are efficient in spending. However, some schools' budgets were developed merely for compliance purposes but were not operational. Therefore, anticipating unplanned and unanticipated expenditures is essential.

8.2.3 Addressing the challenges emerging from the management of state-allocated funding by rural schools' principals and School Governing Bodies to ensure quality education

The current researcher also found that rural school SGBs struggle to raise funds and secure donations. Furthermore, they do not use effective ways to raise funds to supplement the state-allocated funding. Therefore, rural schools cannot afford the many necessary teaching and learning materials. Insufficient state funding in many rural schools calls for different fundraising measures. Hence, SGBs must consider progressive fundraising ways to supplement the funds they receive from the government. Effective resource management plays a significant role in the educational achievement of a school.

The participants shared the same opinions regarding workshops being held to capacitate participants on financial management and compliance with the financial directives. The participants complained that these workshops were not conducted regularly, which led to poor outcomes. Another challenge mentioned was that of SGBs who prioritised personal interests ahead of learners' interests in the procurement processes. SGB training contributes toward the relevant knowledge in school governance. This knowledge, in turn, allows the SGBs to perform their obligations responsibly and effectively. The researcher believes SGB training should always be considered the cornerstone of school governance.

8.2.4 Advancing quality education through educational resources in rural public Schools

Educational resources are perceived as contributing toward advancing quality education. A participant from a small school indicated that they have a borehole which provided the school with water, electricity and enough toilets and classrooms. In one school with a high enrolment, a participant indicated that they have duplicating machines, WiFi, a library and a laboratory. She also mentioned that they have quality teachers in subjects such as English, Mathematics Literacy and Commerce, and extra-mural activities such as music and debate. The researcher views these responses as saying that educational resources

are necessary because schools depend on them to improve the quality of teaching and learning. Therefore, the researcher concurs that the necessary educational resources must be acquired and effectively used so that the schools can achieve their intended educational objectives.

The researcher found that procuring educational resources, particularly electronic devices, significantly advance quality teaching and learning. Schools depend on state-allocated funding to acquire educational resources and request donations. However, schools in rural areas still lag in educational resources, including Information and Communication Technology (ICT). This makes it difficult for schools to achieve equity in these situations. The researcher, therefore, believes that teachers are discouraged from integrating ICT in their teaching and learning.

The participants' responses were the same regarding educational resources' role in improving learners' performance. It emerged from the finance committees that using educational resources improves teaching and learning activities. They also reported that it stimulates the interest of the learners. These responses indicate that schools need additional resources to improve learners' school results. The researcher agrees that adequate school facilities are critical for ensuring quality education and achieving planned educational goals. One also believes that educational resources positively impact learners' performance. This is because educational resources facilitate the teaching and learning processes.

This study also revealed that the participants still face serious challenges relating to a shortage of educational resources. Another finding that emerged is that a culture of teaching and learning grounded on practical educational resources was still challenging in rural schools. He found that many schools do not have the required educational facilities, such as computer rooms, laboratories and libraries. Furthermore, some schools, especially small schools, still have a shortage of teachers. This finding confirms that the quality of education in rural secondary schools cannot be separated from the financial circumstances in these schools. The researcher believes that schools with adequate

infrastructure such as laboratories, electricity, water and ablution facilities offer an environment conducive to learning.

8.2.5 Proposed funding model for addressing the challenges encountered in advancing quality education through state-allocated funding in rural South African schools

Participants also indicated that the current funding model offers insufficient funding in rural schools. Furthermore, state-allocated funding does not meet the demands of these schools. One participant indicated that measures used for determining state-allocated funding were discriminatory, as they overlooked the schools' needs but used the number of learners as the main criterion. The participants expected the Department to allocate funding to schools differently, considering their unique needs. Another response was that the Department should allocate funding based on the submitted budgets to close the gaps between rich and poor schools. An additional response was that the directives for utilising state-allocated funding should be relaxed, as it too many restrictions.

The researcher also found that there is a general problem of safety and security in rural schools. Participants complained that their schools are regularly subjected to theft and burglaries. This has led to diverting funds for teaching and learning repairs and replacing resources affected by crime. Participants believed that -if the Department's adequate security cannot be ensured- the government should allocate additional school funding to employ security personnel. Alternatively, the government should permit schools to use state-allocated funding to provide security.

The participants also complained that SGBs could do as they pleased with state funds, as there was no accountability for deviations. The participants further complained that challenges such as lack of capacity by departmental officials, insufficient SGB training and small schools found it difficult to cope with their finances, as much of their budget went to transport costs. The researcher also found that some SGBs connived with external auditors to produce inaccurate audit reports to cover up for final transgressions. As a result, in Chapter 7, the researcher presented a detailed proposed funding model

for advancing quality education in South African rural schools. The model illustrated what is expected of the state to develop new funding systems for school funding, to offer quality education.

8.3 LIMITATIONS OF THE STUDY

This study is limited to six public schools and three departmental offices in Limpopo province, so the research findings cannot be generalised. The study's research findings are based on the participants' responses from interviews, observations and document analysis. The recommendations originate from the research findings of the sampled schools. The researcher encountered uncontrollable factors. This study was limited by four factors that impacted the research findings. These limiting factors are the research design, data generation methods, data analysis and time frames. These limitations are discussed below.

8.3.1 Research design

Qualitative research using a case study design was selected considering the research aim. A case study design investigates a phenomenon in its real-life situation. In this study, adopting a case study considered the research question, methodology, experience, sample size, delimitation factors, and time and budget allocation. The case study design outlined the investigation procedures, including the participants, the settings and the period data was obtained. This research design indicated the overall strategy in which the research was organised and the data collection methods used. The case study design enabled the researcher to compare and contrast the data collected from different participants to strengthen the research findings. The design gave a detailed description of the national funding model, which will assist school principals, SGBs and departmental officials in pursuing quality education delivery in schools.

8.3.2 Data gathering methods

This study collected data through interviews, observations and document analysis. Using more than one data collection strategy was used for triangulation to enhance the quality

of the results. Interviews were used as the primary source of collecting data. Using semi-structured and open-ended interview questions facilitated asking probing questions that participants did not answer. Using the semi-structured interviews, the researcher could analyse, interpret and compare the data gathered through participants' responses. The physical conditions of the school formed part of the observation. The non-participant observation allowed the researcher to do physical verification to confirm the responses of the participants and to observe unpredicted data sources as they happened. Documents analysis was used to gather supplementary information the researcher could not get during the interview and observation. Based on the research aim and question of the study, the researcher carefully studied and analysed documents with relevant information.

8.3.3 Data analysis

Thematic data analysis was used and presented important themes that defined the phenomenon under study. This analysis showed important patterns of meanings present in the data. It enabled knowledge gathering of the meaning originating from the phenomenon under study. Data organisation, analysis and interpretation focused on the main research questions and interview responses from the participants.

8.3.4 Time frames

Other limiting factors included limited time for data collection, availability of research participants for the planned interviews and audio-recording participants during interviews. Limited time for data collection was caused by school principals not having enough time for interviews, citing reasons that after the official school hours, they need to do school-related duties. At times during school hours, there were a lot of disturbances and interruptions as teachers had to enter the office of the principal seeking assistance in the execution of their duties. On several occasions, the researcher had to postpone the interview sessions due to the unavailability of the participants. Another limiting factor was that some participants did not participate in the interviews as they thought the researcher wanted to gather the information with bad intentions against them.

8.4 DELIMITATION OF THE STUDY

This study's delimitations included the study's focus, research site and participants and the research methodology. These factors are discussed below.

8.4.1 Focus of the study

This study highlighted the significance of state funding for quality education, emphasising the state's role in creating equal opportunities to access quality education by ensuring that funding matches the schools' needs. The researcher explored the existing mismatch between the provision of funding for quality education and the schools' inability to provide quality education because of a lack of adequate funding. This is why this study sought to examine how quality education could be advanced in the rural South African school context through the national school funding model. In this study, the researcher reviewed the literature about advancing quality education through national school funding in the context of international and South African policies and practices.

8.4.2 Research site and participants

The research sites for this study were six secondary schools, a circuit office, a district office and a provincial office in the Limpopo Department of Education. The six rural public schools fall under the *no fee-paying school* category. The six *no-fee schools* selected for participation have been allocated Section 21 status. The participants chosen to participate in this study were; six school principals, six SGB finance committees, one Circuit Deputy Governance Manager, one District Chief Education Specialist: Governance and one Deputy Chief Education Specialist responsible for school funding allocations. SGB members from each school consisted of a chairperson, vice-chairperson, treasurer, finance officer and two additional members. The selection of a small sample allowed the researcher to collect rich data from the participants about the phenomenon under study.

8.4.3 Research Methodology

In this study, the researcher used a qualitative research methodology as it was based on the nature of the research question relating to examining how the national school funding model could be used to ensure quality education in rural South African schools. Qualitative methodology was chosen as it assisted in the choice of purposive sampling strategy. A purposive sampling strategy was applied to select both the schools and participants. The strategy helped select knowledgeable and experienced individuals about the phenomenon under study.

8.5 CONCLUSIONS

This research investigated how the national funding model is implemented to advance quality education in rural public schools. It identified the challenges schools in rural communities face when implementing national funding to advance quality education. It also investigated how rural school principals and School Governing Bodies address the challenges emerging from the management of state-allocated funding. In addition, it sought to establish how educational resources in rural public schools advance quality education. Lastly, it sought to develop a funding model to address the challenges of advancing quality education through national school funding.

The main findings in this research established that while the NNSSF was introduced to redress past imbalances, it is failing to fulfil its intended objectives: to achieve equity, equality and quality. This is because the previously disadvantaged schools remain poor and under-resourced even though the policy explicitly indicates that no-fee schools in Quintiles 1 to 3 should get more funding than resourceful schools in Quintiles 4 and 5. Despite this intervention, underprivileged schools remain poor. Furthermore, affluent schools, which have been previously advantaged, remain privileged under the new dispensation. For example, affluent schools still have better infrastructure, as they continue receiving donations to finance their schools. Therefore, for the South African government to redress past imbalances, school funding should be decentralised, looking

at the specific needs and contexts of rural schools and considering the budgets they should develop to achieve their teaching and learning mandates.

8.6 RECOMMENDATIONS OF THE STUDY

Based on the study's findings, the researcher proposes the following recommendations.

8.6.1 Intensive and continuous training of the SGB parent members in financial management

As outlined in SASA, intensive and continuous training of SGB parent members on their financial management functions should be undertaken to advance the learners' best interests in provisioning quality education. This training will assist them in carrying out their governance tasks effectively. Additionally, training should be conducted in the language SGB parent members understand well. Provision should also be made for all SGBs to get all SASA material in their languages.

8.6.2 Adequate financial management training

The length of the training should be given the required attention. Sufficient time should be allocated to financial management training, considering capacity-building programme objectives against the SGBs' demands. Capacity-building programmes should include practical activities and not be merely presentations by facilitators. This will ensure the SGB members' understanding of their roles and responsibilities can be assessed individually. This approach will help facilitators not adopt a one-size-fits-all approach when conducting SGB training but implement a differentiated approach, depending on the context.

8.6.3 Appointment of competent circuit-based governance officials

Limpopo Department of Education circuit offices has a Deputy Manager: Governance. Therefore, the Department must appoint competent people for these positions, as it was found that some officials lack basic financial management skills. Such incompetency affects service delivery in schools, particularly in governance matters, as their job descriptions involve working with SGBs on an ongoing basis. Careful selection processes

and procedures should therefore be followed in appointing governance officials. The Department should also involve finance and auditing bodies to assist with the capacity building of these officials.

8.6.4 Review of the National Norms and Standards for School Funding (NNSF)

State-allocate funding needs to respond more to rural schools' contexts, not just superficial criteria. This is because NNSF does not seem to achieve its initial objective of redressing past imbalances at these schools. Therefore, the present researcher recommends that NNSF be reviewed to consider allocating funds to schools based on the schools' specific needs. In other words, schools can make budgets according to their different needs and contexts.

8.6.5 Provision of minimum physical infrastructure and facilities

The Department of Basic Education should reach out to disadvantaged schools in rural areas and ensure that basic amenities such as functional classrooms, well-equipped laboratories and libraries, electricity, security and safety measures, computer centres with internet connectivity and water and sanitation are available at every school. The backlogs with these amenities should be addressed; going forward, newly built schools should have all these amenities.

8.6.6 The Proposed Funding Model for Advancing Quality Education in Rural South African Schools

The proposed funding model has been presented in detail in Chapter 7. The model has emerged with improvements that will positively impact the current funding model as it discusses how school funding impacts the delivery of quality education in rural South African schools. The six critical dimensions of the proposed funding model discussed are; governance, curriculum delivery, human resources provisioning, professional development, infrastructure, safety and security.

8.7 RECOMMENDATIONS FOR FUTURE RESEARCH

Based on the findings of this study, I would like to recommend that:

- 8.7.1 Future research is conducted using the quantitative approach. This approach will accommodate a larger population, more participants will participate in the research, and a more detailed funding model can be developed.
- 8.7.2 Research should be conducted on SGB capacity building in financial management, considering the specific needs and challenges encountered at rural schools in Limpopo and the rest of South Africa.
- 8.7.3 Future research is conducted on how the Limpopo Department of Education appoints Deputy Managers responsible for governance matters at various circuits within the province.
- 8.7.4 Research be conducted on the impact of NNSSF on Social Justice and equity.
- 8.7.5 The researcher proposes that future studies look at developed Eastern countries, such as Japan and developing South American countries.

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ANNEXURES

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**ANNEXURE A: ETHICAL CLEARANCE
CERTIFICATE**



UNISA COLLEGE OF EDUCATION ETHICS REVIEW COMMITTEE

Date: 2021/03/10

Ref: **2021/03/10/30581842/03/AM**

Name: Mr J Motona

Student No.: 30581842

Dear Mr J Motona

Decision: Ethics Approval from
2021/03/10 to 2026/03/10

Researcher(s): Name: Mr J Motona
E-mail address: 30581842@mylife.unisa.ac.za
Telephone: 063 699 9951

Supervisor(s): Name: Prof N.R Marishane
E-mail address: nmarishane@gmail.com
Telephone: 061 523 3871

Title of research:

**Advancing quality education through the national school funding model in rural
South African context**

Qualification: PhD Education Management

Thank you for the application for research ethics clearance by the UNISA College of Education Ethics Review Committee for the above mentioned research. Ethics approval is granted for the period 2021/03/10 to 2026/03/10.

*The **medium risk** application was reviewed by the Ethics Review Committee on 2021/03/10 in compliance with the UNISA Policy on Research Ethics and the Standard Operating Procedure on Research Ethics Risk Assessment.*

The proposed research may now commence with the provisions that:

1. The researcher will ensure that the research project adheres to the relevant guidelines set out in the Unisa Covid-19 position statement on research ethics attached.
2. The researcher(s) will ensure that the research project adheres to the values and principles expressed in the UNISA Policy on Research Ethics.



University of South Africa
Preller Street, Muckleneuk Ridge, City of Tshwane
PO Box 392 UNISA 0003 South Africa
Telephone: +27 12 429 3111 Facsimile: +27 12 429 4150
www.unisa.ac.za

3. Any adverse circumstance arising in the undertaking of the research project that is relevant to the ethicality of the study should be communicated in writing to the UNISA College of Education Ethics Review Committee.
4. The researcher(s) will conduct the study according to the methods and procedures set out in the approved application.
5. Any changes that can affect the study-related risks for the research participants, particularly in terms of assurances made with regards to the protection of participants' privacy and the confidentiality of the data, should be reported to the Committee in writing.
6. The researcher will ensure that the research project adheres to any applicable national legislation, professional codes of conduct, institutional guidelines and scientific standards relevant to the specific field of study. Adherence to the following South African legislation is important, if applicable: Protection of Personal Information Act, no 4 of 2013; Children's act no 38 of 2005 and the National Health Act, no 61 of 2003.
7. Only de-identified research data may be used for secondary research purposes in future on condition that the research objectives are similar to those of the original research. Secondary use of identifiable human research data requires additional ethics clearance.
8. No field work activities may continue after the expiry date **2026/03/10**. Submission of a completed research ethics progress report will constitute an application for renewal of Ethics Research Committee approval.

Note:

*The reference number **2021/03/10/30581842/03/AM** should be clearly indicated on all forms of communication with the intended research participants, as well as with the Committee.*

Kind regards,



Prof AT Motlhabane
CHAIRPERSON: CEDU RERC
motlhat@unisa.ac.za



Prof PM Sebate
EXECUTIVE DEAN
Sebatpm@unisa.ac.za



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ANNEXURE B
APPLICATION LETTER TO CONDUCT RESEARCH

Enquiries: Motona Johannes
072 370 7320

1 Hauptfleisch Street
Florapark
Polokwane
0699
28 May 2020

Limpopo Department of Education
Research Ethics Office
Private Bag X 9489
Polokwane
0700

**REQUEST FOR PERMISSION TO CONDUCT RESEARCH IN THE LIMPOPO
DEPARTMENT OF EDUCATION**

Title of the research: **Advancing quality education through the national school funding model in a rural South African context**

I, Johannes Motona, am doing research under the supervision of Prof. Ramodikoe Nylon Marishane, a senior lecturer in the Department of Education Management and studying toward a Doctor of Philosophy in Education Management at the University of South Africa. The study examines how quality education can be advanced through the national funding model in rural South Africa. Your department has been selected because the research targets six public secondary schools, one circuit office, one district office and the Provincial Department of Education.

The study will identify the challenges schools in rural communities face in implementing the national funding model to ensure quality education. Qualitative research using a case study design will be used in this study in consistence with the research purpose. The benefits of this study are developing a funding model that will assist in addressing challenges encountered in advancing quality education through national funding in rural South African schools. No potential risks will be involved in this study. There will be no reimbursement or any incentives for participation in the research. The feedback procedure will entail sharing the research findings and recommendations with the

Limpopo Department of Education, the circuit, the district and all the six secondary schools that shall have participated in the study.

Yours sincerely,

Motona Johannes (Researcher)

**ANNEXURE C: LETTER OF APPROVAL TO CONDUCT RESEARCH - LIMPOPO
DEPARTMENT OF EDUCATION**



LIMPOPO
PROVINCIAL GOVERNMENT
REPUBLIC OF SOUTH AFRICA

**DEPARTMENT OF
EDUCATION**

CONFIDENTIAL

Ref: 2/2/2 Enq: Mabogo MG Tel No: 015 290 9365 E-mail: MabogoMG@edu.limpopo.gov.za

Motona J
POSTNET SUIT 278
Private Bag x9307
Polokwane
0700

RE: REQUEST FOR PERMISSION TO CONDUCT RESEARCH

1. The above bears reference.
2. The Department wishes to inform you that your request to conduct research has been approved. Topic of the research proposal: **“ADVANCING QUALITY EDUCATION THROUGH THE NATIONAL SCHOOL FUNDING MODEL IN RURAL SOUTH AFRICAN CONTEXT”**
3. The following conditions should be considered:
 - 3.1 The research should not have any financial implications for Limpopo Department of Education.
 - 3.2 Arrangements should be made with the Circuit Office and the School concerned.
 - 3.3 The conduct of research should not in anyhow disrupt the academic programs at the schools.
 - 3.4 The research should not be conducted during the time of Examinations especially the fourth term.
 - 3.5 During the study, applicable research ethics should be adhered to; in particular the principle of voluntary participation (the people involved should be respected).

REQUEST FOR PERMISSION TO CONDUCT RESEARCH: MOTONA J

Cnr. 113 Biccard & 24 Excelsior Street, POLOKWANE, 0700, Private Bag X9489, POLOKWANE, 0700
Tel: 015 290 7600, Fax: 015 297 6920/4220/4494

The heartland of southern Africa - development is about people!

3.6 Upon completion of research study, the researcher shall share the final product of the research with the Department.

4 Furthermore, you are expected to produce this letter at Schools/ Offices where you intend conducting your research as an evidence that you are permitted to conduct the research.

5 The department appreciates the contribution that you wish to make and wishes you success in your investigation.

Best wishes.



Mrs Dederen KO
Acting Head of Department



Date

REQUEST FOR PERMISSION TO CONDUCT RESEARCH: MOTONA J

**ANNEXURE D: LETTER OF APPROVAL TO CONDUCT RESEARCH - CAPRICORN
NORTH DISTRICT**



LIMPOPO
PROVINCIAL GOVERNMENT
REPUBLIC OF SOUTH AFRICA

DEPARTMENT OF
EDUCATION

CAPRICORN NORTH DISTRICT

Private Bag X 9711
POLOKWANE
0700
Tel: 015 285 7410
Fax: 015 285 7499

Ref: 2/2/2 Enq: Matsane BK Tel No.:015 285 7410 Date: 05 July 2020 Email:MatsaneBK@edu.limpopo.gov.za

To : Mr Motona J
1 Hauptfleisch Street
POLOKWANE
0699

**SUBJECT: REQUEST FOR PERMISSION TO CONDUCT RESEARCH IN ADVANCING
QUALITY EDUCATION THROUGH THE NATIONAL SCHOOL FUNDING MODEL IN
RURAL SOUTH AFRICAN CONTEXT AT CAPRICORN NORTH DISTRICT (6
SECONDARY SCHOOLS), LIMPOPO PROVINCE.**

1. The above matter refers.
2. The Department wishes to inform you that your request to conduct a research has been approved.
3. The following conditions should be considered :
 - 3.1 The research should not have any financial implication for Limpopo Department of Education.
 - 3.2 Arrangements should be made with both the circuit offices and schools concerned.
 - 3.3 The conduct of research should not in any way disrupt the academic programs in schools.
 - 3.4 The research should not be conducted during the time of examinations especially the fourth term.
 - 3.5 During the study, research ethics should be practiced, in particular the principle of

**SUBJECT: REQUEST FOR PERMISSION TO CONDUCT RESEARCH IN ADVANCING QUALITY EDUCATION THROUGH THE
NATIONAL SCHOOL FUNDING MODEL IN RURAL SOUTH AFRICAN CONTEXT AT CAPRICORN NORTH DISTRICT (6
SECONDARY SCHOOLS), LIMPOPO PROVINCE.**

**Blaauwberg & Yster Street, Ladanna
Capricorn North District, Private Bag X 9711, Polokwane ,0700**

" We Belong, We Care, We Serve "

voluntary participation (the people involved should be respected).

- 3.6 Upon completion of research study, the researcher shall share the final product of the research with the Department.
4. Furthermore you are expected to produce this letter at Circuit and Schools where you intend to conduct your research as evidence that you are permitted to conduct the research.
5. The Department appreciates the contribution that you wish to make and wish you success in your research.

Best wishes



**MR MOTHEMANE KD
DISTRICT DIRECTOR**

05/07/2020

DATE

SUBJECT: REQUEST FOR PERMISSION TO CONDUCT RESEARCH IN ADVANCING QUALITY EDUCATION THROUGH THE NATIONAL SCHOOL FUNDING MODEL IN RURAL SOUTH AFRICAN CONTEXT AT CAPRICORN NORTH DISTRICT (6 SECONDARY SCHOOLS), LIMPOPO PROVINCE.

Blaauwberg & Yster Street, Ladanna
Capricorn North District, Private Bag X 9711, Polokwane ,0700

"We Belong, We Care, We Serve"

ANNEXURE E: PARTICIPATION INFORMATION SHEET

Dear Participant

I, Mr Johannes Motona, am presently studying towards Doctorate in Philosophy in Education Management with the University of South Africa (UNISA). My research topic is **Advancing quality education through the National School Funding model in a rural South African context**. The research project will be conducted with the school principal, School Governing Bodies (SGBs), and departmental officials responsible for school funding. The research participants have been selected purposively to be part of the study because of their involvement in school finances. This study will collect data from school principals and departmental officials through in-depth interviews and SGBs through focus-group interviews. In-depth interviews with each participant will take approximately 1 hour, and focus-group interviews with each SGB will take approximately 1 hour.

Participation in this study is voluntary, and you have the right to withdraw at any stage. Withdrawal can be before or during the data collection process, even if you have already signed the consent letter. The information obtained will be treated with the strictest confidentiality and anonymity and will be used solely for this research. You are also free to ask any clarity-seeking questions at any stage of the research data collection period. You are informed that there is no reimbursement or compensation for participating in this study. Nevertheless, the study's results will contribute toward developing a model to advance quality education through the National School funding in rural South African schools.

For any research-related queries, please get in touch with my promoter, Prof. R.N. Marishane, at 061 523 3871 or email, nmarishane@gmail.com

If you need any further information, contact me on the details below:

Name: Johannes Motona

Mobile number: 072 370 7320

Email Address: motona792@gmail.com

If you are willing to participate in this study, please sign the consent letter overleaf as a declaration to participate in this research project. Under no circumstances will the identity of the interview participants be made known to any parties or organizations.

Kind regards,
Johannes Motona

ANNEXURE F: SCHOOL PRINCIPALS' CONSENT FORM

I,, a school principal, fully agree to participate in Johannes Motona's research study with UNISA. The purpose of the study, "Advancing quality education through the National School Funding model in a rural South African context", was explained to me in writing.

I voluntarily participate and understand that I can withdraw from participating at any time, before or during the study, without any penalties. Furthermore, I understand that the researcher will not disclose my identity, and my name may not be quoted in the final report.

Name and surname of participant (print):

Signature of participant:

Date:

Name and surname of the researcher (print):

Signature of researcher:

Date:

ANNEXURE G: FOCUS GROUP CONSENT AND CONFIDENTIALITY AGREEMENT

I, grant consent that Johannes Motona may use the information I share during the focus group for research purposes. I know the group discussions will be digitally recorded, and I grant consent for these recordings, provided that my privacy will be protected. I undertake not to divulge any information shared in the group discussions to any person outside the group to maintain confidentiality.

Name and surname of participant (print):

Signature of participant:

Date:

Name and surname of researcher: (Please print):

Signature of researcher:

Date:

ANNEXURE H: DEPARTMENTAL OFFICIALS' CONSENT FORM

I,, a Department of Education official, fully agree to participate in Johannes Motona's research study with UNISA. The purpose of the study, "Advancing quality education through the National School Funding model in a rural South African context", was explained to me in writing.

I voluntarily participate and understand that I can withdraw from the study at any time, before or during the study, without any penalties. Furthermore, I understand that the researcher will not disclose my identity, and my name may not be quoted in the final report.

Name and surname of participant (print):

Signature of participant:

Date:

Name and surname of the researcher (print):

Signature of researcher:

Date:

ANNEXURE I: INTERVIEW SCHEDULE FOR SCHOOL PRINCIPALS

1	How would you describe your role as the principal in managing state-allocated funding to ensure a quality education?
2	In your opinion, what can you regard as the importance of the national school funding model in ensuring quality education?
3	What financial management knowledge and skills do you must administer school finances?
4	What challenges do you experience in managing the state-allocated budgets in your school?
5	In your opinion, how can the challenges you face in using the state-allocated budgets be addressed, and what strategies do you use to augment your allocated budgets?
6	Which form of support do you get from the circuit, district and provincial offices?
7	How do the available educational resources assist the school in enhancing quality education?
8	Which resources do you still need to advance quality education, and why?
9	What do you suggest the Department should do to ensure that the funding allocated to your school matches your goals?
10	Do you have anything to add?

ANNEXURE J: INTERVIEW SCHEDULE FOR DEPARTMENTAL OFFICIALS

1	How would you describe your role as a departmental official responsible for managing state-allocated funding to ensure quality education?
2	In your opinion, what can you regard as the importance of the national school funding model in ensuring quality education in rural schools?
3	What financial management knowledge and skills do you give rural schools on utilising state-allocated funding?
4	What challenges do rural schools experience in the management of state-allocated funding?
5	What kind of support do you give rural schools' principals and School Governing Bodies to address the challenges they encounter in the management of state-allocated funding to advance quality education?
6	How do you provide resources to advance quality education in rural schools?
7	What do you suggest the Department do to ensure that the funding allocated to rural schools matches their goals?
8	Do you have anything to add?

**ANNEXURE K: INTERVIEW SCHEDULE FOR SCHOOL GOVERNING BODIES
(FOCUS GROUP)**

1	How would you describe your SGB's functionality in managing the state-allocated funding to ensure quality education?
2	What educational objectives do you want to achieve in utilising state-allocated funding?
3	What financial management capacity do you must administer the school finances?
4	What challenges do you experience in using and managing the state-allocated funding in your school?
5	In your opinion, how can the challenges you experienced in using state-allocated funding be addressed and what strategies do you use to supplement your allocated funding?
6	Which form of support do you get from the circuit, district and provincial offices?
7	How do the available educational resources assist the school in enhancing quality education?
8	Which resources do you still need to advance quality education, and why?
9	What do you suggest the Department should do to ensure that the funding allocated to your school matches your goals?
10	Do you have anything to add?

ANNEXURE L: OBSERVATION SCHEDULE

ASPECTS	COMMENTS (Availability, maintenance and renovation)
1. PHYSICAL CONDITION OF THE SCHOOL	
1.1 Classrooms	
1.2 Laboratories	
1.3 Libraries	
1.4 School hall	
1.5 Computer Centre	
1.6 Office for principal	
1.7 Staff room	
1.8 Sports fields	
1.9 Safety and security	
1.10 Electricity	
1.11 Internet connectivity	
1.12 Water and sanitation	
1.13 School telephone and email address	
1.14 Computer for office administration	
1.15 Photocopier	

2. TEACHING AND LEARNING	
2.1 Learning and teaching Support materials and equipment used for teaching and learning.	

ANNEXURE M: DOCUMENTS ANALYSIS GUIDE

DOCUMENTS	AVAILABILITY/ NON-AVAILABILITY	COMMENTS
1. School Development Plan		
2. School Improvement Plan		
3. School Budget		
4. Finance Policy		
5. Procurement Policy		
6. Fundraising Policy		
7. Assets and Maintenance Policy		
8. LTSM Policy		
9. LTSM Register		

ANNEXURE N: DECLARATION OF EDITING

SCHOOL OF HUMAN AND SOCIAL SCIENCES

16 January 2022

Department of Educational Management & Leadership
University of South Africa
Pretoria
0001

Dear sir/madam

This letter serves to certify that I have proofread Mr J. Motona's dissertation, titled, "Advancing Quality Education through the National School Funding Model in a Rural South African Context".

The proofreading entailed editing some parts of it, where I felt it would make the document more understandable, such as avoiding wordiness, redundancy, and others. However, I have not tampered with the document's content, except where I found that this constituted repetition or made the content confusing.

After the suggested corrections, the research will be ready for submission.

Thank you for your time.

Sincerely
V.T. Bvuma
Mobile: 083 423 9227



University of Venda

UNIVERSITY OF VENDA

PRIVATE BAG X5050, THOHOYANDOU, 09502, LIMPOPO PROVINCE, SOUTH AFRICA
TELEPHONE (015) 962 8172 FAX (015) 962 4749
E-mail: Vincent. Bvuma@univen.ac.za

"A quality driven, financial sustainable, rural-based comprehensive University"

ANNEXURE O: INTERVIEW TRANSCRIPT

How would you describe your SGB's functionality in managing the state-allocated funding to ensure quality education?

Secretary: We use these monies most of the time to outsource teachers as we have realised that, at times, these learners understand outside teachers more than their everyday teachers. We use the percentage for curriculum as per the prescripts for this purpose. In drawing the budget, we ensure that teachers list their needs; afterwards, their needs are taken to the SGB. The SGB then looks at it and calls parents meeting for the parents to approve the budget.

Finance Officer: We use these norms and standards funding in line with the budget according to allocated percentages. Sometimes the money for a particular purpose gets finished, and we borrow from the other budget item. The money is not enough. We also prioritize what we want when we buy things—the finance committee checks how the money is used monthly. But since COVID started, we didn't meet, and the parents were not given annual audited financial statements for the past year and this year.

What financial management capacity do you have to administer the school finances?

Finance Officer: We can use these monies as we use them according to the prescripts.

What efforts do you take in acquiring financial management capacity?

Secretary: We attend financial management meetings, showing how to use the school funds and draw a budget. They also tell us that we should keep records of using the money.

What educational objectives do you want to achieve in utilising state-allocated funding?

Secretary: we want to see ourselves having enough educational materials so that we can be able to provide quality education, such as overhead projectors and science materials to demonstrate the lessons. Presently, we are running short of many resources.

To what extent does the state-allocated funding assist the school in reaching its goals and realizing its vision?

Treasurer: This money is not enough. We are unable to reach the school goals. It helps as we can buy other things, but over the course of the year, the money gets finished. So, we can't achieve what we need.

What challenges do you experience in using and managing the state-allocated funding in your school?

Chairperson: Our school is very small, Sir; it is not long since the school was established. This school serves the poor community. Sometimes we ask for Typek papers, but our parents can't afford to buy them. We also have a problem with burglary. Thieves come to the school and destroy our strong rooms. We take the money and use it for things we did not budget for, as we have to fix the strong room many times.

In your opinion, how can the challenges you experienced in using state-allocated funding be addressed and what strategies do you use to supplement your allocated funding?

Secretary: We are asking the Department to increase the allocation as the money is little. We tried to fundraise, but it is difficult as the parents are complaining that the school likes money and they better take the children to the neighbouring village where learners do not pay casual monies and bring Typek to school.

Which resources (Human, physical and financial) do you have that assist the school in improving quality education?

Finance Officer: Textbooks are enough even though we still have a little shortage in some subjects. But we can make copies for the learners. We also have a shortage of Physical Science teachers. We outsource teachers to come and teach learners. Like in Geography and Life Orientation, we have one teacher teaching these two subjects from Grade 8 to 12. The teacher can't be productive.

Chairperson: A teacher cannot teach from grade 8 to 12. This is a challenge. It makes them tired. The Department has to assist small schools.

How did you acquire the resources?

Secretary: Textbooks are from the Department. Other books we loaned from neighbouring schools. We have an overhead projector that we bought using the norms.

What are the changes in using the available resources to advance quality education?

Finance Officer: Not all of us use the overhead projector. But I have realised that those using it can show the learners what they teach. It has a great effect as their results also improved. Learners in Geography, Life Sciences and Mathematics, have improved in performance.