

Equity, Equality and Fairness: Funding for Quality Education in South Africa

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ABSTRACT This conceptual reflective paper focuses on South Africa's provision of democratic and equitable funding of education in her effort to provide equality and equity to address the past inequalities. In the past 15 years, funding of education system was differentiated along races and ethnic lines. This situation was as a result of the bigger apartheid ideology which leant on the philosophy of divide and rule. With the dawn of a democratic government in 1994, the new government amalgamated all education departments into one department. Thus, several White Papers in education were promulgated by parliament from 1995 which culminated in the National Education Policy Act 27 of 1996 and the South African Schools Act 76 of 1996. The Constitution of the Republic of South Africa Act 108 of 1996 preamble says that, "we people of South Africa believe that South

Africa belongs to all who live in it, united in our diversity and we want to heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights”. After 20 years of democracy in RSA, the question that this paper raises is: “Is equity funding for quality basic education in RSA feasible, given the history of inequalities?”

INTRODUCTION

The salient feature of education in South Africa was the differential pattern of education development for different groups along the lines of colour, race, class, and ethnicity. While whites received a very high level of education, which was comparable with the best in the industrialized world, nevertheless, black education was characterized largely by an inequitable allocation of resources, overcrowded classrooms, high dropout rates, and insufficient numbers of and poorly qualified teachers. Against the background of apartheid, the education system was divided into four main systems for four groups that is education for Whites, Indian, Coloureds, and Africans. For the white community, there was a system of free, and compulsory education, and for the black groups, that is, Africans, Indians, and Coloureds, education was neither free nor compulsory (Tshivhase-Phendla and Mashau 2010, Christie 1986, Enslin 1986).

Apartheid education was generally considered by blacks to be inferior and designed to confine them to lower class occupations. There were differences even within black education, that is, Indian and Coloured education systems were more privileged to a degree higher than African education. These divisions served to entrench separate development in all aspects of life in South Africa. Consequently, it could be safely predicted that separate

education could never have resulted in equal development of all South Africans.

Administration and control of African education passed from provincial administration in Natal, Transvaal, Orange Free State and the Cape Province, and from mission churches, to separate Bantu Education Section in the Department of Native Affairs of the Central Government. The results of the Bantu Education Act were profound and subsequently endorsed racial differences in education (Hartshorne as cited in Lewis and Lemmer 2004). We do not hesitate to assert that Bantu Education reinforced the apartheid ideology of the past regime and was enshrined in the basic and essential human right, that is, education. We make a claim that probably, education continues to create disparities given the historical and deep rooted divisions in South African in the past apartheid years.

While the new government has demonstrated its commitment to provide equitable, fair and quality education and redress the past inequalities through a myriad of legislations and Acts, albeit, we question the current National Norms and Standards for School funding education and its capacity to improve the quality of education for all South Africans. The question we raise in this paper is “Is equity, equality and fair funding for quality basic education in RSA feasible, given the history of inequalities?”

FUNDING OF BASIC EDUCATION: A HISTORICAL BACKGROUND

State of Affairs Prior 1994

In the foregoing paragraphs we have provided a brief insight into the historical divisions and fragmentations in the provision of education in South Africa. In addition, prior 1994 two departments of education fell under the

jurisdiction of the national parliament of the day; four fell under the governments of the so called self-governing territories; and four of which had four provincial components, fell under the jurisdiction of racially composed administrations answerable through a variety of structures of their own elected assemblies (Davies 2005).

African education was further fragmented into seven departments of education in the self-governing territories or the so-called homelands, Kwa-Ndebele, Ka-Ngwane, Lebowa, Kangwane, Qwa-qwa, Kwa-Zulu, and Gazankulu, and four departments in the previously nominally states which were Transkei, Bophuthatswana, Venda and Ciskei. Subsequently, educational control and administration in the pre-democratic era was curious mixture of varying degrees of decentralization and centralization (Classen 1995).

In apartheid South Africa, those self-governing territories were located according to ethnicity and culture. The White race benefitted more than African (Black) race. Schools were also divided in terms of city, township and rural. For instance, children from city areas had very different experiences from children in the rural areas. Furthermore, there were also vast differences between rural and farm schools; and further immense disparities between township and squatter camps.

At the time the duplicating education bureaucracy was mainly a result of the 1983 Tri-Cameral Constitution, which made provision for both 'general affairs', and 'own affairs' were defined as those matters which specifically or differentially affected a population group in relation to the maintenance of its identity and the upholding and furtherance of its way of life, culture, traditions and customs in state administration (Booyse 2011). Thus, we perceive the administration of education at 'own affairs' level, through three councils of ministers administering the education of Whites, Coloureds and

Indians. At 'general affairs' level two departments operated in the following two ways:

First, the **National education** which was seen as an umbrella department was responsible for determining general policy in the following areas:

- Norms and standards for the financing of education for all population groups;
- Salaries and conditions of employment of educators;
- Professional registration of educators; and
- Norms and standards for syllabuses and examination and certifications of qualifications.

Second, the **Education and training** was responsible for African education outside the national states. Thus, the peculiarity existed that while education for other racial groups was 'own affairs', it was general affair in case of education for Africans.

According to Chisholm (2005) inequalities were apparent in differential spending which had an impact on access to, and the quantity and quality of education on offer to Africans and Whites. Typical indicators were literacy levels, school completion rates, learner-educator ratios, number, quality and qualifications of educators and availability of different types of resources. On all indicators, the poorest off were Africans living in the previous homelands, on farms, in townships and squatter camps without basic facilities for education to take place.

Nonetheless, we have witnessed major and dramatically changes in education in RSA since 1994 as demonstrated above and supported by various scholars. We believe South Africa has undertaken the major task of transforming the inequitable political, economic and social system that characterized the past apartheid era into a democratic society which aims to provide equal opportunities for all its citizens. While Motala, Porteus and

Tshoane (2002) assert that central to this transformation is the establishment of a quality, equitable and democratic system of education. We however, believe that translation into real transformation is still amiss; it still lies on paper in the policies and legislations, but short of implementation.

State of Affairs Since 1994

According to the Constitution of South Africa (Act 108 of 1996), as well as a White Paper on Education and Training (RSA, 1995) (a policy document that preceded the promulgation of the National Education Policy Act of 1996), education and training are basic human rights. The National Education Policy Act (Act 27 of 1996) states that the Minister of Education may determine national policy for education, including policy for the provision of support services in areas such as health, welfare, career and vocational development, and counselling and guidance. The different provincial departments of education should provide these services to learners and educators in order to ensure effective education and training as fulfilment of the basic human rights requirement (Mashau, Steyn, van der Walt and Wolhuter 2008).

We infer that the new government has been engaged in the ambitious task of transforming the rigid political, economic and social system that characterised the apartheid era into a democratic society that offers all racial groups the opportunity to participate fully as citizens, workers, and fulfilled individuals. But what we also suggest is that this transformation should construct an equitable and democratic education system which provides quality education for all.

According to Fiske and Ladd (2002) central to the design of the new system of co-operative government was the view that each province should receive an equitable share of the national revenue for the purposes of providing the

public services for which it was responsible. Since 1997, the national government has transferred an annual single unconditional grant to each province to be spent on education, health, welfare and other miscellaneous services. These equitable shares are based on a weighted average of demographically driven formulas that apply to each major functional area, where the weights reflect the proportions of spending allocated grant to each expenditure category.

We assume that the funding goal for education is embedded in the calculation of the equitable shares is the endeavour to guarantee distributional equity across the provinces, where equity is defined in terms of the opportunity for each province, regardless of its wealth, to spend the same amount on education per learner as any other province. An explanation which in our opinion is problematic and as consequence may fail to provide equitable educational outcomes for all South Africans. Unless we ignore the gross disparities in the provincial contribution to national GDP amongst the nine provinces in RSA, where Gauteng and the Western Cape provinces are on top of the list with 33.3% and 14.4% respectively, whereas, Eastern Cape and Limpopo provinces are at the bottom with 8.1% and 6.7% respectively. (www.southafrica.info/about/geography/provinces.htm, accessed 03 May 3, 2011). South Africa provinces thus, a state of equitable shares will remain elusive and a faraway dream.

Fiske and Ladd (2002) further indicate that an adequacy approach to equity would have required the national government to provide each province with sufficient revenue for the province to meet the basic educational needs both of its typical learners and the high cost to educate learners. Instead, the amount distributed to each province was determined primarily by the total funds available at the national level, with the distribution among provinces

determined by the number of learners' age and school population in each province.

While there are major and esteemed changes in the state of South African schools, regardless of these changes, there are also deep continuities with the past. In our opinion, it is not surprising that the poorest provinces such as Eastern Cape, Limpopo, Kwazulu-Natal and Mpumalanga with the poorest schools and largest unemployment ratios are those that incorporate former homelands which were as well divided in terms of ethnic groupings. Probably, the realities of public schools in these former homeland based provinces are founded on the divisive history of the past apartheid regime. Thus, shaking the past off would require unconditional commitment from policy makers, politicians, intellectuals, academics and every citizen, given the history of more than two centuries which gave South Africa a unique identity of divide and rule oppressive hegemony.

We perceive these dynamic dichotomies with awe, in that, while discrimination in state resources allocation has been removed, inequalities persist for a number of reasons. First, by virtue of the locality of schools in different and poor provinces, access and provision is already defined and marginalized. Second, the ability or inability of parents to pay for fees which contribute to the greater availability of additional qualified educators in some schools is a major factor, and unfavourable learner-education ratios to schools that cannot afford to employ additional educators (Chisholm 2005, Motale 2002). There are more and substantive reasons that we may put forward to support these dichotomies.

ON THE ROAD TO EQUITY AND REDRESS

The Constitution of the Republic of South Africa Act 108 of 1996 which is the supreme law of the country together with several legislations was embraced to unify all races and ethnic groups to become one South Africa. The Constitution of the Republic of South Africa Act 108 of 1996 preamble says that, “we people of South Africa believe that South Africa belongs to all who live in it, united in our diversity and we want to heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights”. Therefore, a single unifying education system was irrefutable to move the government towards equity and redress. As a result, the South African Schools Act, 84 of 1996 (SASA) and the National Norms and Standard for School Funding were promulgated.

South African Schools Act, 84 of 1996 (SASA)

South African Schools Act came into being in 1996. The Act is to provide for a uniform system for the organization, governance and funding of schools; to amend and repeal certain laws relating to schools; and to provide for matters connected therewith. It also entails the way in which parents should help schools in terms of bringing their children to school, funding of their children’s education. It also gives guide on how the state should fund schools.

The Preamble to the SASA states that “this country requires a new national system for schools which will redress past injustices in educational provision, provide an education of progressively high quality for all learners and in so doing lay a strong foundation for the development of all our people’s talents and capabilities.”

According to Fiske and Ladd (2002) this is the main legislation related to schools, the South African Schools Act of 1996 (SASA). The Act provides for a national system of schools that includes both public schools and

privately financed independent schools, makes education compulsory for learners from the age of seven to fifteen, or through Grade 9 and prohibits schools from discriminating among learners based on race or their inability to pay school fees. In accordance with the Constitution of the Republic of South Africa of 1996, Section 29 (1) (a-b), that says that ‘everyone has the right- to a basic education, including adult basic education; and to further education, which the state, through reasonable measures, must make progressively available and accessible’.

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

In addition the National Education Policy Act of 1996 calls on the Minister of Education to set norms and minimum standards for the funding of public schools after consultation with the Minister of Finance. Subsequently, the Council of Education Ministers from the nine provinces and the Fiscal Commission, an advisory group set up to provide advice on issues of inter-governmental relations. Thus, the National Norms and Standards for School Funding were conceived. As well, we recognize these National Norms and Standards for School Funding as notable and significant implementation strategic tools to redress the inequalities and assist with a provision of quality education for all South African,

National Norms and Standards for School Funding

The National Norms and Standards for School Funding set out the national norms and minimum standards for school funding in terms of South African

Schools Act No. 84 of 1996. It also deals with the procedures to be adopted by provincial education departments in determining resource allocation to their schools. These norms and minimum standards deal with the public funding of public schools amongst others.

The National Norms and Standards for School Funding was gazetted in October 1998 and became a national policy on 1 April 1999 while its implementation started in 2000 (Nicolaou 2001 and Karlsson, Mcpherson and Pampallis 2002). The National Norms and Standards established funding procedures which promote equity and redress within a context of inadequate government spending and increasing parental financial support for education. The document sets out the minimum standards associated with the public funding of public schools, and exempts parents who are unable to pay school fees.

The National Norms and Standards for School Funding's purpose are to effect redress and equity in school funding with a view of progressively improving the quality of school education, within a framework of greater efficiency in organizing and providing education services. The norms and standards indicate the method of distribution of funds according to certain categories. The funding norms recognizes that SASA imposes a responsibility on all public school governing bodies to do their utmost to improve the quality of education in their schools by raising additional resources to supplement those which the state provides (Patel 2002).

The National Norms and Standards for School Funding require provincial education departments to prioritise the neediest schools when making decisions about capital expenditure and to provide higher levels of recurrent non-personnel, non-capital funding for schools in poorer communities. Moreover, National Norms and Standards for School Funding provide for governing bodies to give fee exemptions to poorer learners. Nonetheless, it

does not address educator salaries or provincial education department's school level expenditure (Pampallis 2002 and Karlsson et al. 2002).

According to Karlsson et al. (2002) to bring about redress among existing schools, provincial education departments are required to direct 60% of the non-personnel and non-capital expenditure towards 40% of the poorest schools in their provinces. In order to implement this strategy, provinces are required to compile a list of schools based on their socio-economic levels of development and physical resources. The 'resource targeting list' is used to divide schools into five categories based on needs.

First, the poorest 20% of schools receives 35% of resources, while the next poorest 20% receive 25%. Second, the next two categories receive 20% and 15% respectively. The last 20% of schools, which are largely former Model C and former House of Delegates schools, receives 5% of resources. The above recurrent cost allocation is used to fund water and electricity bills, maintenance of buildings and the purchase of learning materials which is equivalent to at least R100 per learner. The policy states that if provinces lack sufficient funds, priority will be given to the poorest schools. It also deals with the procedures to be adopted by provincial education departments in determining resource allocation to their schools.

Table 1: Resource Targeting Table Based on Condition of Schools and Poverty of Communities

School quintiles from poorest to least	Expenditure allocation (percentage of resources)	Cumulative percentage of schools	Cumulative percentage of non-personnel and non-capital recurrent expenditure	Per learner expenditure indexed to an average of R100
Poorest	35	20	35	175

20%				
Next 20%	25	40	60	125
Next 20%	20	60	80	100
Next 20%	15	80	95	75
Least 20%	5	100	100	25

Source: Government Gazette No. 19347, October 1998:27

To simplify the above diagram:

SCHOOL QUINTILES	EXPENDITURE ALLOCATION
	%
Quintile 1 (poorest)	35
Quintile 2	25
Quintile 3	20
Quintile 4	15
Quintile 5 (least poor)	5

THE NEW DEMOCRATIC ORDER

Although the current form of funding has created platforms for redress of the past inequalities, it is still short of the translation to free education given that students are still expected to provide their own school uniforms, and these do not come cheap. School uniforms are compulsory and they cost a fortune to the majority of poor and unemployed African parents in the townships, rural and informal settlement areas in the South Africa (Tshivhase-Phendla and Mashau, 2010).

On the other hand, white schools are still well resourced since they inherited the resources from the former regime. While the state subsidized them with a percentage aligned to the schools' category, this seems not to dent the financial capacity of many of these "former white only" schools since they

still receive support in forms of sponsorship and donations from the private sector, which are still in the hands of a few white people. These white parents are able to donate money from their businesses and in turn get it back from the government in form of tax rebates.

Many of these schools demand high tuition fees where parents pay R 63 780-R66 090 per annum in one of the schools in Gauteng (Beaulieu College) to sight one example which the majority of African parents cannot afford. As a result, access to these schools is limited to those who can afford these exorbitant fees. To have access to these schools of high quality means African parents have to part with large sums of money because these “former whites only” schools are found in exclusively white urban areas which demands that African students need special forms of transport to travel from their township residences to these urban schools. With a small wage or salary, African parents have to make ends meet. They have to dig deep into their already semi-empty pockets. White schools still carry the token of quality due to their exclusive physical infrastructure, buildings, security and these schools enjoy continuous teaching, while black school continue to exist in unsafe environments, schools without fences, where drug dealers have free reign.

What is interesting with National Norms and Standards for School Funding policy is that, it also wants to address the construction of new infrastructures and maintenance of the current infrastructure. The planning for new school construction includes provision of water, electricity, sewage and telephone services on site, and connections to main services where these are provided to the school site. The construction of new schools or additional classrooms and learning facilities should be targeted to the neediest population. On the other hand construction of new schools is within provincial governments’

budgets, the provincial governments unfortunately have limited budget to can start new construction for schools.

Many of the poorest schools in South Africa were based in the former homelands or what was referred to as self-governing states. We are not surprised to note that African (Blacks) learners from poor provinces such as Limpopo, Eastern, Cape, Mpumalanga and Kwa-Zulu-Natal still walk more than 20 km to go to the centre of learning. This is very unfortunate for Africans who suffered for a long period and better life is seen nowhere in sight. South Africa has not yet reached a point of addressing the inequity, unfairness and inequality of the past due to backlog which was found since the inception of democracy in 1994. Though policy to redress the inequality of the past is there, it is little bit difficult to realize the dream due to the huge demand and minimal resources.

CONCLUSIONS

We conclude that whereas the democratic government is trying to address the imbalances of the past by legislations that are relevant to address the needs of the poor, yet, the problem that arises is that many children from formerly homeland states are still experiencing the poverty that was there before 1994. On the one hand, debates and discourses around funding of national education are particularly entangled in the dynamic and dichotomous challenges between redress of the past discrimination to remove inequalities and the inefficient implementation of the National Norms and Standards for School Funding policy strategy. On the other hand, the most heated and debated issue around funding tends to overlap substantially across income levels as well as socio-economic formations.

In our modest contribution to the heated debate on the National Norms and Standards for School Funding strategy and our efforts to address the main question of this paper, that is “Is equity funding for quality basic education in RSA feasible, given the history of inequalities?” Our noble response is that the past historical inequalities and disparities are exceptional and notable. Nevertheless, we reiterate that while the norms and standards’ purpose are to effect redress and equity in school funding with a view of progressively improving the quality of school education, we have not yet moved remarkably far from Verwoerd’s philosophy of divide and rule if we still find children taught under trees and in mud huts in the so called new South Africa especially in parts of Eastern Cape, Kwazulu-Natal and Limpopo Provinces (Tshivhase-Phendla and Mashau 2010).

Consequently, African students and educators are still subjected to unequal provision of education inadvertently, racial and class segregation remains central to this condition. Given the foregoing realities, questions that sprung to our minds are: “Besides the National Norms and Standards of School Funding what other measures and strategies are pivotal to the provision of quality education to all learners in South Africa? We continue to ask few questions we rose in (Tshivhase-Phendla & Mashau 2010) and explore the possibilities of the provision of quality education. We ask, “If education is a fundamental democratic right in a democratic society, then how democratic is this democratic right in such a democratic society? Simply put, where do we place young African students in this democracy? Are they in the centre of the picture or on the periphery? How far can education under a tree provide equality for all citizens? This democratic right is enshrined in the Bill of Rights, in terms of Section 29 of the Constitution of the Republic of South Africa (Tshivhase-Phendla and Mashau 2010).

While we do not claim to provide authoritative answers to the questions raised in this reflective conversation, nor, in truth would we be able to, our position is that it is a basic role of the national government, policy makers and politicians, to provide access, equity, equality in South Africa, the legacy of differences continues to characterize provision of our education.

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