Embracing equitable learning in managing the physical and financial resources in South-African-schools: A social justice perspective

Edmore Mutekwe (iD)

School of Professional Studies in Education, North-West University, Mafikeng, South Africa
edmore.mutekwe@nwu.ac.za, emutekwe@yahoo.com

In this article I report on the findings of an empirical study conducted to show the merits of integrating equitable learning by members of the South African School Governing bodies (SGBs) in managing the physical and financial resources. Within the interpretivist paradigm and utilising a qualitative descriptive phenomenological design, the data generation followed the use of an unstructured questionnaire administered to a sample of 30 participants purposefully sampled. Adopting a social justice perspective as the lens, we unpack the necessity of learning equity in the SGB's dealing of school resources. The study was guided by the following key research question; How can South African schools embrace the learning equity agenda in managing their physical and financial resources? The findings show that adopting such principles of equity in learning as integrating diversity in the equitable deployment of the physical and financial resources goes a long way towards entrenching social justice in managing the resources. The key conclusion was that unless members of the SGBs adopt an equitable mechanism for allocating these resources in the face of competing priorities, real equitable learning remains elusive. The recommendations include the need for adopting policies designed to deal with the complex relationships between concerned stakeholders in the provision of guidelines for public-school funding – most of which come from public budgets.

Keywords: Education Laws Amendment Act; equitable learning; financial resources; physical resources; school governing bodies; South African Schools Act; stewards

Introduction and Background

Drawing insights from such legislative pieces as the Education Laws Amendment Act (ELAA), the South African Schools Act (SASA), the Employment of Educators Act (EEA) and the Public Finance Management Act (PFMA), brings to the fore the role and legal rights that members of the SGBs have towards the management of their schools' physical and financial resources (Mestry, 2018). The new ELAA clearly spells out a further dimension to the SGBs' accountability in financial management by virtue of the fact that principals in their stewardship role are expected to submit annual financial reports to their heads of department (HoD), which entails, inter alia, the effective management of the physical learning support materials and other resources (Mestry & Hlongwane, 2009). This further shows that school principals are accountable to their HoDs for the physical and financial management of resources in their schools and also to their SGBs for certain assigned financial functions. Owing to their rights as promulgated in the Bill of Rights, it is apparent that following the right to dignity, equity, privacy and just administrative action, school principals are obliged to observe the principles of social justice in their professional code of ethics (Mestry & Dzvimbo, 2011). Nonetheless, members of the SGB, which includes school principals, are accountable for the management of all the school's financial resources. Despite the important strides adopted by the South African government in an endeavour to address issues of equity, redress and social justice in the distribution of educational resources, some challenges remain – especially as far as the implementation of policies is concerned. Such challenges certainly affect the process of bringing about the necessary transformation to the Department of Basic Education (Bisschoff & Mestry, 2003).

Carlisle, Bailey, Jackson and George (2006) note that it is evident in the differences in school types, particularly in terms of their physical, human and financial resources, that forms of inequalities such as racial, gendered, class-based and socio-economic types continue to be reproduced. This is despite the system purporting to be not only egalitarian but also democratic. Mestry and Dzvimbo (2011) further note the sad reality that in spite of the remarkable and just progress made to ensure a fair distribution of public funds through such programmes as the National Norms and Standards for School Funding (NNSSF), significant disparities persist. These are attributed partly to the educational legacy of the apartheid regime, the lack of SGBs' financial management knowledge and skills as well as the schools' limitations in terms of state funding. Mestry (2006) contends that in spite of the Department of Education offering financial management training for members of the SGBs, many schools still face challenges in this regard – more often than not when their financial problems are referred to the department – many of which remain unresolved.

Guided by the NNSSF, Mestry and Dzvimbo (2011) assert that from the year 1996 the government's educational reforms have been focused on access, equity, redress, quality, efficiency and democracy. This implies that the state has made some important strides in addressing issues of equity emanating from the past imbalances in the management of educational resources for schools (Mestry, 2006). Quite a good number of educational policies, for example, the post-provisioning norms, rationalisation and redeployment of teachers and non-teaching staff, management of school fees, the role of SGBs and the NNSSF as well as acceptable

interventions, are testimony to this view (Mestry, 2006). To a certain extent, observing these legislative aspects helps members of the SGBs to attain principles of social justice such as, learning equity, an idea that is aptly described by McGee Banks and Banks (2015) and Van der Westhuizen (2012) as a process designed to empower virtually all learners through availing not only equality of educational opportunity to them but also ensuring that they receive fair treatment in their learning institutions. Learning equity implies ensuring that social justice prevails in the use of these resources by learners regardless of their diversity in terms of racial, ethnic, sexual, gendered, religious, social class, ability/disability, culture or creed (Van der Westhuizen, 2012).

Theoretical Framework

According to the social justice perspective adopted for this study, it is important to note that Sections 34 and 35 of the SASA mandate the state to address the historical imbalances in a bid to promote the achievement of equity and the restructuring of the South African educational landscape (Mestry & Dzvimbo, 2011). Frederking (2014) views the concept of social justice as describing fair or just social relations of people in society, as determined by the distribution of the wealth, opportunities for personal activity and social privileges. As a theory, social justice is, therefore, a relative and contested construct, which some scholars like Pearce and Cumming-Potvin (2017) view as not only relative but also ideological and asymptotic. This further implies that there are multiple perspectives on the meaning of the concept. Nevertheless, Pearce and Cumming-Potvin's (2017) definition suffices for the application of the theory to this study. They define social justice as a process aimed at ensuring that the social systems and structures of society are rendered fair or just through the eradication of any possible barriers that may prevent the basic human rights of individuals from being fulfilled. A similar view is also echoed by Calderwood (2003) in his assertion that social justice is a process that works towards undoing socially enacted and maintained distinctions of material conditions of living that seek to reduce the perpetuation of the privileging of some at the expense of others. Rawls (1999) observes social justice as entailing ways in which benefits and burdens are fairly distributed among members of society.

In the context of this study, the theory is conceived of as affording individuals and groups as stakeholders in educational institutions an impartial treatment and share of social, environmental and economic benefits (Lucas, Walker, Eames, Fay & Poustie, 2004). Social justice thus promotes an equitable sharing or distribution of resources, advantages and disadvantages within a given society regardless of their background factors or social status. In a socially just management process of, for example, an educational institution's physical and financial resources, there should be clear elements of equity, access, participation and protection for the benefit of the members of society without any bias (Orkodashvili, 2009). For Pérez-Garzón (2019), the concerns of social justice cover issues predominantly associated with human rights such as equitable learning or respect for human rights as manifested and upheld in every level of society. The etymology of social justice is traceable to the theological work by Augustine of Hippo and the philosophy of Thomas Paine. However, the term became used explicitly in the 1780s by a Jesuit priest, Luigi Taparelli, who is credited with coining and disseminating it during the revolutions of 1848 with the work of Antonio Rosmini-Serbati (Clark, 2015). However, some writers like Rawls (1999) are of the view that adopting expressions such as social justice is quite ancient because it was used even before the 19th century. In the late twentieth century, the concept "social justice" became central to the philosophy of the social contract, primarily by John Rawls in *A Theory of Justice* (2005). The Vienna Declaration and Programmes of Action in the year 1993 treated social justice as a purpose of human rights education (Banai, Ronzoni & Schemmel, 2011; Kahn, 2012).

From the aforementioned view, it is apparent that equity in learning (equitable learning) implies addressing past imbalances and accelerating the realisation of principles of social justice in education (Clark, 2015; McGee Banks & Banks, 2015). Section 34 of the SASA also prescribes the state to fund public schools from public revenue on an egalitarian basis to ensure the proper exercise of the learners' rights to equitable learning in schools as learning organisations (Moloi, 2005). Drawing from Section 35 of the SASA, which stipulates how the state should carry out the responsibility described in Section 34, Mestry (2006) observes two salient features of these sections. Section 35(2)(b) provides for the creation of quintiles for individual learners. This has not been achieved up to now with the NNSSF instead noting that the provision of the national school quintiles for learners is always the same as the national quintile for the public schools in which they are enrolled. Secondly, the criteria adopted for allocating schools to a given quintile are ridden with inconsistencies in a sense that parental income, wealth and level of education are privileged information, Mestry further notes. In addition to this, in the majority of schools in the Gauteng North district, many learners reside outside of the vicinity of the school and commute daily to school from outside the feeder zones. Some of these learners come form areas where schools have been allocated the wrong quintile with learners being

consequently disadvantaged by an inaccurate funding formula used to determine their state subsidy (Mestry, 2004).

Korukonda and Bathala (2004) are of the opinion that for the present world order, forces of free market capitalism are often cited for much of the inequities or social disparities constituting social injustice. This is particularly in terms of the educational resource allocation and outcomes. As a result, the educational disparities in resource allocation and provision of access between the affluent and non-affluent schools remain a great challenge, which needs to be addressed through the enactment of the learning equity agenda in schools (Chisholm, Motala & Vally, 2003). This aspect is of paramount importance given that it sometimes translates into the disparities of life patterns in the learners' life chances (Chisholm et al., 2003). In the South African schooling context the aforementioned polarisation of schools has, despite the demise of the apartheid educational system, become so pronounced that only two worlds of schools exist: the affluent and non-affluent worlds of schools (Korukonda & Bathala, 2004).

Despite the political rhetoric, there remains an urgent need for redressing the interrelated principles of social justice in the management of physical and financial resources of schools and principles such as learning equity, equal access to resources, fair participation, equal rights and privileges need to be addressed (Chisholm et al., 2003). Some scholars, for example, Motala and Pampallis (2002), even argue that although the use of former apartheid racist terms, Model C and Township schools have been outlawed, they subtly remain in existence and many of the South African learners are fully aware of this. In Darling-Hammond's (1996) view, the unequal resource allocation for schools by the state has essentially been removed, but inequalities continue to persist in terms of the availability of the physical and financial resources. This is due to a plethora of reasons, including the inability of parents to pay school fees, poor learners' inaccessibility to schools in affluent areas, high dropout rates, the unavailability of qualified teachers in some schools, and the unfavourable learner-teacher ratios – especially in "former township black public schools" in general (Darling-Hammond, 1996). Despite substantial government interventions, Motala and Pampallis (2002) note that issues of social justice – particularly equitable learning in the management of the schools' physical, human and financial resources – are not properly served by the implementation of the NNSSF. The reasons advanced include that inequalities based on race, class and to a lesser extent, gender, continue to exist not only in the education system but in the general South African society (Motala & Pampallis, 2002). However, the need for extensive fund-raising projects by parental bodies such as commercial sponsorship and fee income, have enabled many such schools to add to their resources and to expand their range of extramural activities – much to the disadvantage of some – particularly the dysfunctional schools (Mestry & Bisschoff, 2009).

Sayed and Motala (2012:672) contend that the need to establish a quality, equitable and democratic education system was of paramount importance to South Africa's transformation of the inequitable system of apartheid education. However, this goal seems to have remained a pipe dream given that only inequalities in social spending have been considerably reduced since the year 2000 with spending disparities remaining due to the enormous expenses required to achieve fiscal parity. In the immediate post-apartheid period, Mestry (2004) notes that the chief impetus has been on the distribution of resource inputs through policy and legislation based on equity and redress. However, by the year 2000 the South African education system was still characterised by rampant inequalities, which have continued hitherto. As a result, the dichotomy of rich and poor schools in the public schooling system has continued to increase despite the cohort of learners being a mixed bag in some schools (Sayed & Motala, 2012). The above-mentioned theory, coupled with the stakeholder and institutional theories, are the ones adopted as the lens for this study. A brief overview of the stakeholder and institutional theories reveals that while the latter, as perceived by Lincoln (1995:1147), offers the core conception of development on matters affecting institutions, particularly the propensity for social structures and processes to acquire meaning and stability in their own right rather than as instrumental tools for the achievement of specialised ends, the former relates to theoretical models that facilitate understanding of the complexities of today's business challenges. Stakeholder theory or stakeholder thinking implies a new way of thinking to understand and correct three interconnected business problems: understanding how value is created and traded, connecting ethics and capitalism and helping managers think about management so that the first two problems are addressed (Suddaby, 2010). In this article the major uses and adaptations of stakeholder theory in helping to account for the effective management by members of the SGBs of a broad array of physical and financial resources for schools as well as issues of strategies, finance, accounting, management and marketing are brought under the spotlight. I also examine and suggest possible future trends and directions in which research on stakeholder theory can continue to provide useful insights into the practice of sustainable and ethical value creation by members of the SGBs within schools, not only in South Africa, but globally.

Aim and Objectives

I aim to explore how embracing an equitable learning agenda helps members of the SGBs in their management of the physical and financial resources in South African schools. In pursuit of this broad aim, the following objectives were formulated:

- To establish the merits of embracing the principles of equitable learning in the role of the SGBs' management of the physical and financial resources of South African schools;
- To examine the role of SGBs in managing the physical and financial school resources;
- To determine the principles of learning equity SGB members find necessary and sufficient in managing South African schools' resources
- To identify the interventions necessary for the effective management of South African schools' physical and financial resources.

Research Questions

The study was guided by the following research questions:

- What are the merits of SGBs embracing the learning equity principles in their management of the physical and financial resources in South African schools?
- What role do SGBs play in managing the physical and financial school resources?
- Which principles of learning equity do SGB members find necessary and sufficient for the effective management of the physical and financial resources in their South African schools?
- What interventions are ideal for the SGBs' effective management of the physical and financial resources in their South African schools?

Problem Statement

While the South African government is the chief custodian of the provision of effective education for its subjects, a variety of educational researchers have shown that the relationship between its provision of resources (physical, financial or human) to the schools and learner achievement often makes a difference. The Organisation for Economic Co-operation and Development ([OECD], 2017) shares this view. It is also important to note that the OECD describes a grouping comprising 37 member countries that discuss and develop economic and social policy issues. Further to this, it is also crucial to note that OECD members are typically democratic countries supporting free-market economies (OECD, 2017). In the South African school context, it is apparent that learners who attend affluent or well-resourced schools generally perform much better than their counterparts attending inadequately resourced ones (Heystek, 2004). Despite the South African government's efforts at addressing the challenges associated with inequitable learning and the need for social justice through introducing financial resources for building physical infrastructure for previously disadvantaged, non-affluent public schools, a number of these schools have remained not only dysfunctional but also underachieving (Mestry, 2013). Contrary to this view and despite the affluent and advantaged schools continuing to receive very little financial resources from the government, many of them are still able to sustain effective education for their communities and these observations have posed critical questions regarding the reasons for such a dichotomy (Asmal, 1999). While it is of paramount importance to note that global trends indicate the challenges of those governments grappling to effectively finance school education, particularly providing them with the necessary physical infrastructure, it has serious ramifications for SGBs and the provision of quality education in South African schools (OECD, 2017). In terms of the provision of financial resources, the current economic climate has forced the South African government to reduce their budgets in education (Mestry, 2006). Added to this problem is the issue of many immigrants to South Africa from poorer countries outside her borders – many of whose children deserve equitable learning opportunities in line with the principles of human dignity and social justice (Chisholm et al., 2003).

In order to accommodate all learners in schools, the South African government is obliged to introduce educational funding models and policies to meet international standards of social justice (Mestry, 2006; Sayed & Motala, 2012). Some of these aspects make it imperative for the South African government to seek the achievement of educational policy objectives and the provision of the physical and financial needs of learners through financial resourcing. In view of the fact that the bulk of public school funding comes from public budgets, the challenge of developing effective mechanisms to allocate this funding among competing priorities becomes an important policy concern for the government (OECD, 2017). Since the dichotomous schooling systems have limited resources with which to pursue their objectives, effectively dealing with the issues of equitable learning and social justice issues in financing schools, using the resources efficiently becomes yet another challenge for the SGBs (Mestry, 2018). It is in this light that Sayed and Motala (2012) contend that the management of school funding is always characterised by complex relationships between the various stakeholders involved in the fund-raising and expenditure for schooling. Further to the above, Sayed and Motala (2012:672) argue that in spite of almost 20 years of democracy in South Africa, equitable access to quality education remains elusive for most of learners. For example, in 2007, the Department of Education declared 40% of schools in the country to be "no-fee" schools but by 2011 60% of all schools had been designated as such.

Contribution of the Study

The findings reported herein are expected to make some practical, theoretical and policy contributions. The findings are expected to go a long way towards sensitising members of SGBs and the Department of Education on the importance of integrating the principles of learning equity in managing the physical and financial resources in their respective schools as they aspire to ensure that social justice prevails (Mestry & Hlongwane, 2009). Theoretically the findings of the study will add to the existing body of literature or scholarship on how integrating learning equity enhances the effective management by members of the SGBs as the custodians of the management of the physical and financial resources of schools to ensure a high degree of learning equity or equitable learning (McGee Banks & Banks, 2015; Mestry, 2004). In fact, the contribution to theory would indeed be scant without stating that integrating equity in learning enhances the management of funds by SGBs. In addition, the study also contributes by adding a flare to the stakeholder theory and to the institutional theoretical frameworks, which are capitalist views that stress the inter-relationships of the schools as businesses and their customers, suppliers, employees, investors, communities and others who have a stake in the institutions (Young Upstarts, 2013). From a stakeholder's theoretical viewpoint, schools as firms ought to create value for all of their affiliates, not just shareholders (Young Upstarts, 2013). The stakeholder theory also challenges school managers to think clearly about their school business methods and the relationships which they need to forge with their institutions or company stakeholders to effectively deliver the physical and financial resources (Young Upstarts, 2013). Such relationships between the institutions and the stakeholders are essential in establishing the long-term success or failure of schools – just like companies (Young Upstarts, 2013). Further to this, the findings are also expected to influence schools as institutions and governmental policy on the need for members of the SGBs as part of the stakeholders to incorporate principles of equity in learning in their management of virtually all the physical and financial resources available in their schools.

Limitations of the Study

The study was constrained by the need for non-probability or purposeful sampling, which rendered the participants to be precise elements of SGBs. As a qualitative study, a small sample size was thus involved culminating in the inductive data analysis typical of the research results. Had the study adopted a mixed methods approach involving probability or random sampling for the quantitative section, then perhaps the results would have had external validity or could have been generalised to perhaps apply to the whole of South Africa.

Research Methodology

In this section the research paradigm, approach, design, population, sampling and data generation methods are examined.

Research Paradigm and Approach

The study was situated in interpretivism, a paradigm that stresses the importance of reality as subjective and constructed in interactions involving multiple perspectives (Nieuwenhuis, 2016). The research followed a qualitative approach because of its strengths in dealing with non-numerical facts and data that relate to subjective human behaviour to help the researcher understand their everyday social life through data generation methods such as unstructured questionnaires or interviews (Bhasin, 2019).

Research Design

The study followed a qualitative phenomenological design as the strategy of inquiry or design genre. A phenomenological design genre was adopted because of its appeal to an analysis of individuals' lived experiences within their social world (Nieuwenhuis, 2016). Through this strategy of inquiry, I was able to construct the meanings that members of SGBs ascribe to the roles and responsibilities they play in managing the physical and financial school resources, which the participants construed as their lived experiences.

Population and Sampling

The target population comprised of members of the SGBs from a total of 60 quintile 5 secondary schools in the Gauteng North education district. It was from this population where a total sample size of 30 participants was conveniently and purposefully sampled. The sampling processes were motivated by the proximity of the participating schools and the fact that all of the participants were SGB members within the conveniently sampled education district.

Data Generation and Ethical Considerations

The data generation method for this qualitative study involved the use of unstructured open-ended questionnaires, which were administered to a total sample size of 30 participants – all of whom were members of SGBs. To ensure a 100% response rate, I sought consent from the SGB members and school principals to administer the questionnaires after SGB meetings. Prior to their completion of the questionnaires I collected the consent forms from the participants, reiterated the objectives of the research, and assured them that their responses to the questionnaires would remain anonymous

(Motala & Pampallis, 2002). Furthermore, I informed them that their identities would remain private and confidential (Pérez-Garzón, 2019). The participants were also reminded that their participation was voluntary and that they were at liberty to withdraw from the study without any penalties at any time (Clark, 2015). Furthermore, they were also guaranteed non-maleficence or protection from harm given the relaxed atmosphere in which the questionnaires were administered. A cordial data generation process ensued, culminating in me being able to get a 100% data response rate.

Data Analysis, Results and Discussion

The data analysis process followed a thematic approach in which the codes emanating from the interpretation of the questionnaire responses were first clustered into code families before being assigned to the different themes that eventually formed the basis of the discussion of the results (Schindler, 2010). The emerging themes were as follows: the merits of SGBs integrating learning equity in managing the physical and financial school resources in South Africa, the role of SGBs in managing schools' physical and financial resources, the learning equity principles necessary and sufficient for the management of the physical and financial resources by SGBs in South African schools, and ideal interventions for ensuring learning equity in managing the physical and financial resources of schools.

Findings under each of these themes are discussed in the subsequent sections and it is important to note that where verbatim statements are used, pseudonyms are used in place of the participants' actual names.

The Merits of SGBs Integrating Equitable Learning in Managing the Physical and Financial School Resources in South Africa

In responding to the question of benefits that derive from integrating the learning equity agenda in their management of the physical and financial school resources, many of the participants were of the view that since 1994, working with the government, they had focused on redressing their school's imbalances towards achieving equity and restructuring education in their schools from the legacy of apartheid. About half of the respondents pointed out that the parents and the communities at large always had a say in the management and spending of financial resources. When asked to elaborate on their responses, many argued that despite substantial government revisions of the education system, there was still widespread misconception about who is accountable for public schools' finances, and whether social justice and equity have been adequately served by the implementation of the NNSSF. Responding further to the question of who exactly was accountable for the management of their schools' finances, quite a number of respondents claimed that legislation such as SASA, PFMA, EEA and the ELAA needed to be examined to resolve the issue of whether the principal and/or SGB is actually accountable for the management of school finances. On the issue of incorporating learning equity in managing schools' physical and financial resources, about 20 respondents, representing two thirds of the sample of the study, claimed that this social justice element was merely alluded to in meeting discussions with none claiming to be fully conversant with the implementation modalities. As a result, it remains elusive in practice.

In this regard, one respondent, Wajiji, responded as follows:

> The implementation of the amended NNSSF needs to be examined to establish whether the state has in fact addressed the issue of social justice and equity in ensuring that all the physical, human and financial resources are equitably distributed to all public schools and learners in the provision of equitable and quality education to all.

On the question of who was to blame for the mismanagement of the physical and financial school resources, about 18 respondents pointed out that the accountability of school resources, most notably school finances, have been distorted by legislative measures such as the SASA. They argued that the SASA was the first attempt to involve communities in school governance and to set guidelines for self-managing and governing schools. The self-management of schools implies a process of decentralisation, through which the state started delegating power and authority to schools with a shared decision-making model engaging various stakeholders. The above findings vindicate the assertion by Mestry and Hlongwane (2009) who note that as a result of such aspects, SASA gave unbridled responsibilities to SGBs of public schools, placing them in a position of enormous trust towards managing the schools' physical and financial resources, albeit at the expense of efficient running of the schools' affairs.

The Role of SGBs in Managing the School's Physical and Financial Resources

The first question on their role was to highlight their role as members of SGBs in general and in managing the physical and financial resources specifically. In response, 20 members of the SGBs began by unpacking their SGB as constituents of statutory bodies involving parents, principals, teachers, non-teaching staff and secondary school learners. In further responses to the question they were unanimous that one of their primary functions as SGB members in the school was to guide the establishment of most of the school's physical resources such as buildings and the provision of ideal infrastructure. Their function also included to determine certain policies to be implemented by principals and teachers. On the role of the

decentralisation process, they claimed that despite the view that it accords stakeholders an opportunity to participate at a level in which they can have a direct impact on matters that concern them, it enhances different capacities, inequalities of power, and influence at governance level. Asked to unpack their respective roles as SGB members, it became clear that the role of the principals and the other members of their SGBs in managing the schools' finances was quite complex given that is seems as though the functions of principals and SGBs usually give rise to conflict. In elaborating on the above view, one of the respondents, Mrs Mahomed said the following:

> In order to lessen, or alleviate such conflicts among various stakeholders of schools, provincial departments of education regularly send out circulars or memoranda to the SGB members clarifying the interpretation and implementation of certain complex legislation. It is, therefore, imperative if SGBs are to be effective that they have a thorough knowledge of legislation governing their roles in the management of their schools' resources – particularly school finances.

In their response to the question of where they get their knowledge of rights and responsibilities as members of the SGBs, 15 of the respondents, representing 50%, claimed that as members of the SGBs their rights and responsibilities are clearly defined in the legislation. They further pointed out that by virtue of the Bill of Rights as enshrined in the Constitution of the Republic of South Africa (1996b), their roles as members of SGBs are protected. This implies that the school principal and his or her associated governors as persons having human rights, such as the right to freedom of speech, privacy, human dignity, and the right to just administrative actions are safe guarded from abuse. Owing to this view, it became evident that the SASA and the EEA to some extent incorporate some key principles of social justice, most notably, equitable learning. Further to this, it is important to note that by defining the roles and responsibilities of principals in their official capacity as employees of the departments of education, SASA underpins school governance, while the EEA's emphasis on the professional duties of principals as SGB members in resources management also ensures that some level of social parity prevails in the distribution of the learning resources in the school. On the role played by the PFMA in the management of the school financial resources, the respondents maintained that even though it (PFMA) has no direct bearing on schools, the heads of departments as accounting officers for the provincial departments of education usually prescribe through circulars to principals and SGBs how the state's financial resource allocation for schools should be spent.

Most of the SGB members were quick to point out that expenses were usually ring-fenced because 50% of the budget ought to be allocated towards teaching and learning support materials, while the remainder should be allocated to services rendered, repairs and maintenance of the schools. Sixteen of the 30 SGB respondents argued that the Department had no right to prescribe how state funding in respect of schools' resource allocation should be used because once the Department has determined the budget for schools and released the funds to the schools, it should be the SGB's responsibility to manage such funds. This finding lends credence to the assertion by Roithmayr (2003) whose contention is that while the Department of Education remains technically the custodian of such funds, it essentially has no claim to the school's management and disbursement of the funds. The SGB members also pointed out that in cases where the schools are accorded Section 21 status in terms of the SASA, the funds might just be deposited directly into the schools' banking accounts so that the principal and his or her SGB members simply proceed to manage such financial resources.

Principles of Learning Equity Ideal for the SGB's Management of the Physical and Financial Resources in South African Schools

In explaining the key legislative processes necessary and sufficient for learning equity in South African schools, 18 respondents were of the view that two legislations, the SASA and the EEA were instrumental in this regard. In an effort to unbundle guidelines derived from the SASA and the EEA, the participants pointed out that the SASA, for example, prescribes the governance of the schools' resources and that it remains the prerogative of the SGBs with the professional management of schools to apply. The respondents further noted that the SASA further prescribes that the Department's managerial functions should be restricted to the professional management of the schools through their principals given that these are the employees of the Department. With respect to the schools' financial management activities, the participants cited the SASA's emphasis on cooperating with the parents and the government aimed at ultimately devolving maximum decision-making and power from education departments to SGBs. The respondents also noted the role of the SASA in according SGBs' meaningful functions in managing public schools' finances.

On the duties and responsibilities of SGBs and principals in the school financial management processes, participants were quick to note that the SASA afforded this responsibility to SGBs and not solely to principals. They cited Section 20 of the SASA, which accords SGBs the mandate for financial school management claiming that the responsibilities of the SGBs entail establishing a school fund, preparing annual budgets, collecting

and administering school fees, keeping financial records, appointing an auditor and supplementing the schools' resources. Their responsibilities also include administering and controlling the school's physical resources (grounds, buildings and other property), adopting a constitution, raising funds and allowing the community to use the school premises for events. One of the unstructured questionnaire respondents, Mrs Kalamazoo, said the following about the roles and responsibilities of SGBs members in managing the physical and financial resources of South African schools:

> *The South African Schools Act further makes provision for the SGBs to apply for additional functions in terms of Section 21, and for purposes of maintaining and improving the schools' physical resources, determining the curriculum for extra-mural activities, purchasing of textbooks, educational materials and the payment for services rendered to the schools.*

The aforementioned excerpt clearly demonstrates that the full management of the school's physical and financial resources rests with the SGB's members, whereas provincial departments of education have very little influence on the management of such resources. With regard to the major roles and responsibilities set out in the Personnel Administration Measures (PAM) in terms of the EEA, 12 participants were quick to note that these require that the schools' accounting officers be held responsible for the professional management of their schools. This includes giving proper instruction, leadership and guidelines such as timetables, admission and placement of learners, managing teaching and learning, development of a school culture and activities that support teaching and learning. Some of the participants noted that according to the new ELAA the principals' roles in rendering optimum support to members of the SGBs cannot be over-emphasised. As noted by the participants, despite the principal having no executive role in relation to the SGB with regards to financial and property matters, the amendments to the Act prescribe that he or she should be tasked with the role of managing the curriculum or learning support material, and other equipment, as well as the safekeeping of all school records. One respondent, Mr Ibrahim, said the following about the relationship of school principals and members of the SGB:

> *There is usually a mutual understanding between the school principal and other SGB members. For example, the SGBs can delegate some of the functions to the principal and hold them accountable. It can also be true that some SGB members can hold the principal accountable for financial and physical resource matters, which are not specifically entrusted to the principal by SASA.*

The findings vindicate those of Mestry and Bodalina (2015) on perceptions and experiences of school management teams (SMTs) and teachers on the management of the physical resources in public schools. These authors concluded that school principals as the institutional accounting officers need to have the best book keeping mechanisms to ensure the available financial resources benefit all the learners equally in their schools.

Interventions for Ensuring Learning Equity by SGBs in Managing the Physical and Financial School Resources

Asked to highlight some of the mechanisms they would adopt to ensure the promotion of learning equity in the management of the physical and financial resources, about 10 participants (one third of the sample) cited integrating what can be called the physical and financial resource needs of all the learners, abstaining from abusing the physical and financial resources for schools, adopting equity pedagogies in the school curriculum and avoiding stereotyping learners along unreasonable grounds such as race, gender, age, ethnicity, religion or disabilities. Twelve participants cited what they called "doing away with the challenges to learning equity", which, in their views, entailed integrating the dictates of the ELAA, the new NNSSF and the new regulations relating to the exemption of parents from paying school fees. These participants were of the opinion that these measures were necessary because they said that some schools and learners were at a disadvantage from the start due to the apartheid system of education and some racial and class differences. The participants seemed to be echoing English and Bolton's (2016) concept of cultural capital and how it advantages some learners at the expense of others.

What the above views imply for members of SGBs is that it is crucial for them to adopt an equitable distribution of all school resources, physical, human and financial, so that teaching and learning progress smoothly in all the schools. In further discussing challenges to learning equity the participants were of the view that the NNSSF policy aimed at addressing equity in South African public schools was not successful. Although it was a noble measure, it rather promoted inequitable learning because of the pro-poor funding policy, which compels the state to fund schools according to the quintile ranking systems. Therefore, schools lacking in infrastructure, physical and financial resources and usually located within poor socio-economic environments constitute quintiles 1, 2 and 3 and are basically no-fee-paying schools receiving more state funding than quintiles 4 and 5 schools that do not benefit as much. The participants further noted that as a result, quintiles 1, 2 and 3 schools are often deprived of adequate state funding compared with well-resourced schools, ranked quintiles 4 and 5 and this situation actually accentuates inequitable learning as members of the SGBs have to grapple with the aforementioned school inequalities in their

endeavours to ensure the physical and financial resources are evenly allocated. Further commenting on the above challenges, two of the respondents argued as follows:

> *Following from the above and more recently, quintile 3 schools, serving middle-of-the-range communities, have also been declared no-fee schools and this has led many of the SGBs and principals serving no-fee schools to experience numerous challenges in effectively managing their schools' funds.*

The above thus clearly reveals that although schools in the quintiles 1, 2 and 3 receive more state funding, they are more often than not deprived of the necessary resources for upskilling members of their SGBs for efficiency in managing their resources, particularly when compared to schools in the quintiles 4 and 5. Such results are in line with the contention by Korukonda and Bathala (2004) that above all else, it is worth noting that in an effort to deal with the challenges of inequitable learning and social injustice, the government has made milestone changes in financing public schools with the historically disadvantaged schools being allocated substantial financial resources. The understanding has been that this helps them procure better facilities. However, despite such a development or improvement in resource allocations, quite a number of such schools remain not only dysfunctional but also underperforming.

Conclusion and Recommendations

The effective management of the physical and financial school resources have important implications for the nature of learning that takes place in schools. The key findings from this study include that SGBs are responsible for managing the physical and finances resources of schools. This role is bestowed upon them by legislation – particularly the South African Schools Act (Republic of South Africa, 1996a) of which Section 20 (1) entrusts this role upon them. However, some of the key challenges are that many SGBs lack the requisite knowledge and skills for the effective management of not only the finances of the schools but also the physical resources. This often leads to a lower level of motivation among educators and learners, resulting in appalling learner performances. The development of robust and practical budgets and an ability to procure ample physical resources requires some level of financial management proficiency and more often than not, such skills are not easily available for the majority of SGB members. From this study I thus recommend that the Department of Education needs to hire well-qualified and experienced financial management trainers capable of upskilling SGB members for the efficient management of physical and financial school resources. The training programmes need not only be convenient and cost-effective but specific to these needs to ensure that all SGB members understand the trajectories their schools wish to pursue.

I further recommend that in addition to training SGB members on the need for equitable learning and managing the physical and financial resources in their schools, SGB members need to be accorded control over funds. Perhaps one of the best ways is to follow the Australian example were the principal teams (principals, deputies, HoDs and school managers) determine and manage the budgets for the year in keeping with departmental guidelines and the School Council (Young Upstarts, 2013).

Note

i. Published under a Creative Commons Attribution Licence.

References

Asmal K 1999. *Call to action: Mobilising citizens to build a South African education and training system for the 21st century*. Pretoria, South Africa: Department of Education. Available at https://www.westerncape.gov.za/text/2004/5/tirisanocalltoaction.pdf. Accessed 30 November 2020.

Banai A, Ronzoni M & Schemmel C (eds.) 2011. *Social justice, global dynamics: Theoretical and empirical perspectives*. London, England: Routledge.

Bhasin H 2019. Benefits of qualitative research explained. *Journal of Educational Research and Review*, 2(4):78–85.

Bisschoff T & Mestry R 2003. *Financial school management explained* (2nd ed). Cape Town, South Africa: Pearson Education South Africa.

Calderwood PE 2003. Toward a professional community for social justice. *Journal of Transformative Education*, 1(4):301–320. https://doi.org/10.1177%2F1541344603257280

Carlisle LR, Bailey W, Jackson BW & George A 2006. Principles of social justice education: The social justice education in schools project. *Equity & Excellency in Education*, 39(1):55–64.

Chisholm L, Motala S & Vally S (eds.) 2003. *South African education policy review: 1993-2000*. Johannesburg, South Africa: Heinemann.

Clark MT 2015. Augustine on justice. In T Delgado, J Doody & K Paffenroth (eds). *Augustine and social justice*. Lanham, MD: Lexington Books.

Darling-Hammond L 1996. The right to learn and the advancement of teaching: Research, policy, and practice for democratic education. *Educational Researcher*, 25(6):5–17. https://doi.org/10.3102%2F0013189X025006005

English FW & Bolton CL 2016. *Bourdieu for educators: Policy and practice*. Thousand Oaks, CA: Sage.

Frederking LC 2014. *Reconstructing social justice*. New York, NY: Routledge.

Heystek J 2004. School governing bodies – the principal's burden or the light of his/her life. *South African Journal of Education*, 24(4):308–312. Available at https://www.ajol.info/index.php/saje/article/view/25006. Accessed 30 November 2020.

Kahn E 2012. Global economic justice: A structural approach. *Public Reason*, 4(1-2):48–67. Available at

https://dro.dur.ac.uk/23551/1/23551.pdf?DDD35+
DDC68+vjdl56+d700tmt. Accessed 30 November
2020.

Korukonda AR & Bathala CRT 2004. Ethics, equity, and
social justice in the new economic order: Using
financial information for keeping social score.
Journal of Business Ethics, 54:1–15.
https://doi.org/10.1023/B:BUSI.0000043503.45406
.a6

Lincoln JR 1995. Book review-Walter W. Powell & Paul
J. DiMaggio (Eds.): The new institutionalism in
organizational research. *Social Forces*,
73(1):1147–1148.

Lucas K, Walker G, Eames M, Fay H & Poustie M 2004.
*Environment and social justice: Rapid research
and evidence review*. London, England: Policy
Studies Institute.

McGee Banks C & Banks J 2005. Multi-cultural
education in a modern classroom. *Journal of
Educational Psychology*, 3(1):61–73.

Mestry R 2004. Financial accountability: The principal
or the school governing body? *South African
Journal of Education*, 24(2):126–132. Available at
https://www.ajol.info/index.php/saje/article/view/2
4977. Accessed 30 November 2020.

Mestry R 2006. The functions of school governing
bodies in managing school finances. *South African
Journal of Education*, 26(1):27–38. Available at
http://www.sajournalofeducation.co.za/index.php/s
aje/article/view/67/63. Accessed 30 November
2020.

Mestry R 2013. A critical analysis of legislation on the
financial management of public schools: A South
African perspective. *De Jure Law Journal*,
46(1):162–177. Available at
http://www.scielo.org.za/pdf/dejure/v46n1/10.pdf.
Accessed 30 November 2020.

Mestry R 2018. The role of governing bodies in the
management of financial resources in South
African no-fee public schools. *Educational
Management Administration & Leadership*,
46(3):385–400.
https://doi.org/10.1177/1741143216665838

Mestry R & Bisschoff T 2009. *Financial school
management explained* (3rd ed). Cape Town, South
Africa: Pearson Education South Africa (Pty) Ltd.

Mestry R & Bodalina K 2015. The perceptions and
experiences of school management teams and
teachers of the management of physical resources
in public schools. *Educational Management
Administration & Leadership*, 43(3):433–451.
https://doi.org/10.1177/1741143214549972

Mestry R & Dzvimbo KP 2011. Contestations of
educational transformation: A critical analysis of
how the norms and standards for funding are
intended to achieve social justice and equity
[Special issue]. *Journal of Educational Studies*,
1:9–29.

Mestry R & Hlongwane S 2009. Perspectives on the
training of school governing bodies: Towards an
effective and efficient financial management
system. *Africa Education Review*, 6(2):324–342.
https://doi.org/10.1080/18146620903274654

Moloi KC 2005. *The school as a learning organization:
Reconceptualising school practices in South Africa*.
Pretoria, South Africa: Van Schaik.

Motala E & Pampallis J 2002. Educational law and
policy in post-apartheid South Africa. In E Motala
& J Pampallis (eds). *The state, education and
equity in post-apartheid South Africa: The impact
of state policies*. New York, NY: Routledge.

Nieuwenhuis J 2016. Analysing qualitative data. In K
Maree (ed). *First steps in research* (2nd ed).
Pretoria, South Africa: Van Schaik.

OECD 2017. *The funding of school education:
Connecting resources and learning*. Paris, France:
OECD Publishing.
https://doi.org/10.1787/9789264276147-en

Orkodashvili M 2009. *Double-shift schooling and EFA
goals: Assessing economic, educational and social
impacts*. Nashville, TN: Vanderbilt University.
https://doi.org/10.2139/ssrn.1630889

Pearce J & Cumming-Potvin P 2017. English classrooms
and curriculum justice for the recognition of LGBT
individuals: What can teachers do? *Australian
Journal of Teacher Education*, 42(9):77–92.
https://doi.org/10.14221/ajte.2017v42n9.5

Pérez-Garzón CA 2019. ¿Qué es justicia social? Una
nueva historia de su significado en el discurso
jurídico transnacional**-*** [What is social
justice? A new history of its meaning in the
transnational legal discourse]. *Revista Derecho del
Estado*, 43:67–106.
https://doi.org/10.18601/01229893.n3.04

Rawls J 1999. *Justice as fairness: A restatement*.
Cambridge, MA: The Belknap Press.

Rawls J 2005. *A theory of justice*. Cambridge, MA:
Harvard University Press.

Republic of South Africa 1996a. Act No. 84, 1996: South
African Schools Act, 1996. *Government Gazette*,
377(17579), November 15.

Republic of South Africa 1996b. *The Constitution of the
Republic of South Africa (Act 108 of 1996)*.
Pretoria: Government Printer.

Roithmayr 2003. Access, adequacy and equality: The
constitutionality of school fee financing in public
education. *South African Journal on Human
Rights*, 19(3):382–429.
https://doi.org/10.1080/19962126.2003.11864780

Sayed Y & Motala S 2012. Equity and 'no-fee' schools
in South Africa: Challenges and prospects. *Social
Policy & Administration*, 46(6):672–687.
https://doi.org/10.1111/j.1467-9515.2012.00862.x

Schindler B 2010. Education in South Africa: A
statistical overview of education in South Africa.
Education Africa Forum, 2(1):56–61.

Suddaby R 2010. Challenges for institutional theory.
Journal of Management Inquiry, 19(1):14–20.
https://doi.org/10.1177%2F1056492609347564

Van der Westhuizen GJ 2012. Learning equity in a
university classroom. *South African Journal of
Higher Education*, 26(3):623–637. Available at
https://journals.co.za/docserver/fulltext/high/26/3/h
igh_v26_n3_a15.pdf?expires=1609404609&id=id
&accname=guest&checksum=0C09CDD1100805
D02E2A99D1890101C1. Accessed 30 November
2020.

Young Upstarts 2013. *The stakeholder theory and how it
ties into your corporate objective*. Available at
https://www.youngupstarts.com/2013/12/23/the-
stakeholder-theory-and-how-it-ties-into-your-
corporate-objective/. Accessed 30 November 2020.

Appendix A: Open-Ended Questionnaire for Members of the School Governing Bodies (SGBs)
Instructions to respondents:
Kindly please answer the questions below preferably in the order in which they appear in this questionnaire. The questionnaire consists of one page. You are however free to attach any additional paper if the spaces provided are not adequate for your views. Please do not write your name or attach anything that makes responses to be traceable to you, your school, educators or learners.

1) In a brief statement explain your understanding of the term equitable learning or equity in learning
   _____
   _____
   _____

2) List some of the advantages of equitable learning you realise (if any) in your management of your school's physical and financial resources
   _____
   _____
   _____

3) Briefly explain your role as a member of the SGB in managing the physical and financial resources of your school
   _____
   _____
   _____

4) What in your view would you consider to be some of the principles of equitable learning that need to be included in your role as part of the management of the school's physical and financial resources?
   _____
   _____
   _____

5) State some of the principles of equity in learning that as a member of the SGB you consider necessary and sufficient for the effective management of your school's physical and financial resources
   _____
   _____
   _____

6) List some of the interventions you consider essential for the effective management of many South African schools' physical and financial resources
   _____
   _____
   _____

7) What are your responsibilities as a member of the SGB or leader in helping to mitigate the problem of inequitable learning through your management of the physical and financial resources available in your school?
   _____
   _____
   _____

8) In your views, what should characterise the relationship of members of the SGBs and the general educators in the schools?
   _____
   _____
   _____
   _____

9) What specific features of inequitable learning would you wish to eliminate in the South African education system if you had all the opportunities?
   _____
   _____
   _____

10) Use the space below to express any aspects of equitable or inequitable learning that get you mad
   _____
   _____
   _____
   _____

End of questions. Thank you for your time.