

Art. #1820, 9 pages, <https://doi.org/10.15700/saje.v39ns1a1820>

Theory and practice of the quintile ranking of schools in South Africa: A financial management perspective

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Equitable funding of public schools to reduce the disparities in education inherited by the post-apartheid government of South Africa in 1994 has become a priority. The Amended National Norms and Standards for School Funding (ANNSSF) required the ranking of schools into one of five quintiles of which Quintile 1 represents the poorest schools and Quintile 5 the most affluent. This amendment determines that schools serving impoverished communities should receive more funding. However, challenges exist regarding the implementation of the system, as well as the calculation base for maintenance allocation. In this study we used semi-structured interviews to collect data from 24 respondents from urban and township schools in Gauteng. Participants were selected by means of purposive sampling. Permission to conduct the research was obtained from the Gauteng Department of Education, the university's Ethics Committee and the school governing bodies. We handled financial information from schools with utmost confidentiality. We identified themes from interview transcriptions and we analysed schools' financial statements. The main findings relate to inaccuracies in quintile ranking, which result in inadequate and unfair school funding, which impact on schools' maintenance and learning and teaching. It is recommended that a more holistic approach should be followed to achieve equity in education.

Keywords: disparity; education funding; no-fee schools; poverty score; quintile ranking; school fee exemption formula

Introduction

Since 1994 the first democratically elected government of South Africa has undertaken the major task of transforming the inequitable political, economic, and social system that characterised the apartheid era and it considerably reduced the racial discrimination in social spending. Section 34(1) of the South African Schools Act 84 of 1996 ([SASA], Republic of South Africa, 1996) states that to redress past inequalities in education provision, and to ensure the proper exercise of the rights of learners to education, the state must fund public schools from public revenue on an equitable basis (Republic of South Africa, 1996:24). Concerning the post-apartheid education finance reforms, Motlale (2006:79–80) indicates that distributional equity is emphasised, and progress has been made towards a fairer distribution of public funds across provinces.

The National Norms and Standards for School Funding (NNSFF) (Republic of South Africa, 2012:3) aimed to improve equity in the funding of education by ranking each school into one of five quintiles. This ranking is based on the unemployment rate and literacy rate of the community in which the school is located, with a Quintile 1 ranking indicating a poor/impoverished school, and a Quintile 5 ranking indicating a wealthy/affluent school. The reasoning behind this notion is that schools serving poor communities (Quintiles 1 and 2) should receive more state funding than schools serving wealthier communities. It was expected that this decision should result in an equal and fair distribution of funds between impoverished and affluent schools. The implementation of the quintile system has not, however, proved to be as effective as originally envisaged.

This article is of wider relevance, not only for the South African school education system. From literature it seems that disparities in education are not unique to South Africa, but it is also a matter of concern in the United States of America (USA). Their educational system is also characterised by disparities which have historical, constitutional, and social origins. Although the state plays a considerable role in financing education, it is the responsibility of the school districts to raise revenue for schools. Property tax is the primary source of local revenue for school districts, and as the property wealth varies significantly between districts within a state, it contributes to the disparity. As a result, districts with a smaller property tax base experience more difficulties to generate revenue for their schools than those with a larger property tax income (Ladd, Chalk & Hansen, 1999:1).

An online article in the *Huff Post* (Public school funding unequal: State and local school finance systems perpetuate per-student spending disparities, 2012) states that finance formulas of state schools strive to account for cost differences to attain equal educational opportunities across schools and districts. However, not all schools are successful in carrying out those intentions.

This article aims to highlight the problems and barriers experienced by schools in the Gauteng province (GP), South Africa, with reference to the implementation of the quintile ranking system. In the research that forms the basis of this article, a qualitative research approach was followed.

Background

During the pre-democratic period (pre-1994), the education system in South Africa was extremely complex and education was divided strictly along racial lines (Bell & McKay, 2011:27). This racially divided and fragmented system was characterised by the unfair distribution of resources between schools of different racial groups. The

allocation per learner was as follows: black: R146, coloured: R498, Indian: R771 and white: R1,211 (Dass & Rinqest, 2017:143). That situation needed to be transformed into a unified system, to accommodate all South Africans on a democratic and equitable basis. The post-1994 government was challenged to transform the inequalities existing in all sectors of the South African society (Ahmed & Sayed, 2009:204). Concerning education, Amsterdam (2006:25) confirms that much emphasis was placed on equity in and redress of education funding principles during the post-apartheid era, however, contributions in the form of school fees and fundraising by the community in different schools distorted equity. In an attempt to alleviate the financial barriers experienced by many schools, the South African government introduced two mechanisms: the school fee exemption policy and the no-fee school policy (Hall & Giese, 2009:35). The aim of introducing these mechanisms was to ensure a better financial position for the poorer schools.

Literature Review

Funding

The inflow of funds entails the receiving of monies by the school to be used for the education of learners. In South Africa the lack of funding, as in many other countries, undermines the delivery of quality education (Mestry & Bisschoff, 2009:41). However, to prevent lack of funding and ensure equity in school funding, the ANSSSF that replaced the NNSSF in 2006, came into effect. The NNSSF required the provincial departments to rank each school into one of five quintiles. Quintile 1 represents the poorest schools and Quintile 5 the most affluent. This quintile ranking indicates the poverty score of a school. The calculation of the poverty score of a school is based on the following census data (Mestry & Bisschoff, 2009:47):

- weighted household data on the income dependency ratio, better known as the “unemployment rate” and
- level of education of the specific community, referred to as the “literacy rate.”

The reasoning behind this poverty score is that the schools serving poor communities should receive more state funds than schools serving wealthier communities.

The ANSSSF was implemented to address the inequality in provincial funding allocations, which means that learners of similar poverty levels were differently funded in different provinces. It also indicates province-specific poverty-targeting criteria, which means that schools with similar poverty rankings are placed in different quintiles across provinces (Chutgar & Kanjee, 2009:18).

The amendment of the NNSSF resulted in the poverty quintiles being determined at national level.

Initially 40 per cent of the country’s poorest schools (those in Quintile 1 and 2) were designated no-fee schools (Collingridge, 2013). It would appear that “only the poorest schools were targeted and those schools located in the middle of the resource targeting table, the so-called middle schools (Quintile 3), became neglected and impoverished” (Mestry & Bisschoff, 2009:48). In 2011, the provincial education departments provided Quintile 3 schools with the opportunity to be declared no-fee schools to also alleviate their financial burden (Mestry & Ndhlovu, 2014).

The no-fee schools, which receive a higher funding amount than the fee-paying schools, do not charge any school fees to supplement funding received from government. However, as the poverty scores are still (after the amendment) only based on the geographical area within which the schools are located, poor learners are often found in schools ranked according to higher quintiles.

Basis for the allocation of school funding

Motala and Sayed (2009:2) declare that the basis for the allocation of school funding was developed by using the following five considerations:

- rights of learners, as protected by the Constitution of the Republic of South Africa, 1996;
- a minimum basic package to ensure quality education;
- the prices of goods and services which are needed by the school to ensure effective teaching and learning;
- a national distribution of income differences and poverty, and
- the state budget.

Public spending on schools should target the needs of the poorest. Based on a resource target table, this funding should be allocated to schools in the various quintiles, in respect of capital and recurrent costs. This quintile ranking of schools is of great importance, because it determines the status of the school, which is linked to the allocation of funds by the state. The quintile ranking of the school enables the school to obtain no-fee status. The no-fee schools policy abolished school fees in the poorest 40% of schools nationally. A fee-charging school can apply to the provincial Department of Education to be declared a no-fee school. The schools that do not charge fees are apportioned a larger amount of funding from government (Ahmed & Sayed, 2009:206; Department of Basic Education, 2015:4), and the quintile ranking determines the amount of money allocated to the school. The said ranking of schools, reflecting national targets as well as the percentage of learners in each quintile, is summarised in Table 1 (Department of Basic Education, Republic of South Africa, 2017).

Table 1 Poverty ranking of schools (quintiles) 29 November 2017 (Department of Basic Education, Republic of South Africa, 2017)

%	Quintiles					Total
	1	2	3	4	5	
EC	27.3	24.7	19.6	17	11.4	100%
FS	20.5	20.9	22.4	20.8	15.4	100%
GP	14.1	14.7	17.9	21.9	31.4	100%
KZN	22.1	23.2	20.2	18.7	15.8	100%
LP	28.2	24.6	24.2	14.9	8	100%
MP	23.1	24.1	21.5	17.7	13.5	100%
NC	21.5	19.3	20.7	21.4	17.1	100%
NW	25.6	22.3	20.8	17.6	13.7	100%
WC	8.6	13.3	18.4	28	31.7	100%
SA	20	20	20	20	20	100%

Note. EC = Eastern Cape, FS = Free State, KZN = KwaZulu-Natal, LP = Limpopo Province, MP = Mpumalanga Province, NC = Northern Cape, NW = North West, WC = Western Cape, SA = South Africa.

In Table 1, the national target (South Africa) indicates the ideal percentage of total learners per province that should be allocated to a specific quintile (20 per cent), which indicates a fair and even distribution between the various quintiles. Columns 1–5 indicate the real percentages of learners per province in South Africa that fall within specific quintiles.

Hall and Giese (2009:37) state that, on average, the schools in the lower quintiles have smaller learner numbers than the schools in the upper quintiles. They mention that the mean number of learners in Quintile 5 schools in the 2008 academic year was 700, while the mean number of learners in Quintile 1 schools was 331. According to Table 1, this situation changed in 2017 when 21.1 per cent of the learners attended Quintile 1 schools, while 17.5 per cent attended Quintile 5 schools (Table 1).

Effects of changes

The amended Norms and Standards have had some positive influences on the allocation of funds, more specifically in effectively identifying schools in Quintiles 1 and 5. As funding is based on the quintile ranking, a more effective ranking should have influenced the amount of resources (funding) allocated to schools.

However, according to Stott (2013:174), higher quintile schools tend to have more affluent school governing bodies (SGBs), resulting in societal, material, as well as organisational advantages. Although Quintile 5 schools receive less financial support from the state than Quintile 1 schools, the latter are still worse off in terms of school resources and school composition. The policy brief on no-fee schools by Motala and Sayed (2009:4) states that government schooling still consisted of two tiers; one well-resourced and advantaged and the other poorly-resourced and disadvantaged. This evidence of rich and poor schools and the difference between Quintile 1 and Quintile 5 schools might have raised questions regarding the ability of the amended policy to erase past disparities.

Motala and Sayed (2009:4) are also of the opinion that the schools in Quintiles 2, 3 and 4 may

need the same or even more resources than those in Quintile 1, which suggests that the quintile ranking system is misidentifying schools currently placed in Quintiles 2 to 4. The schools in Quintile 4 are equal to or slightly above the national average in terms of the proportion of disadvantaged families, although this quintile receives much less funding than schools in Quintiles 1 to 3. Chutgar and Kanjee (2009:19) point out that there is "... an urgent need for the regular reclassification of schools to ensure that those in greater need are allocated into the correct quintile rank and thus qualify to receive sufficient levels of funding to meet their specific needs."

A primary school principal in KZN whose school has been ranked at Quintile 5 received an amount of R86,000 from the state and R40,000 from school fees in the 2018 academic year. His school is ranked at Quintile 5 because of its location, while 80% of learners are from poor areas. According to the principal, his school needs R450,000 per annum to break even. The current ranking resulted in his school not being able to, inter alia, pay water and electricity bills. This principal is in favour of the scrapping of the quintile system (Xala, 2018).

Veriava (2007:188) also points out the inaccurate, overstated quintile ranking of many poor schools. This inaccurate ranking results in low state allocations and insufficient resource allocation. Motala and Sayed (2009:4) also comment on the ranking of schools. According to them, in some of the provinces, schools that were deemed poor may find themselves ranked in less poor quintiles (more specifically those in Quintiles 4). These schools receive substantially less funding than the no-fee schools. The poverty score considers both the economic status (poverty) of the community and that of the school. The poverty indicators that are considered when determining the poverty score are

- income;
- the unemployment rate and
- the level of education of the community.

It can be concluded that the poverty indicators may not always accurately capture the poverty level of the learner population. Many learners do not live in close proximity to the school and travel considerable

distances to get to school. These learners are part of the school, but because they reside in a different community, which is generally poorer than the school environment, their real financial status is not considered when the poverty score is calculated. For example, the financial situation of learners residing in informal settlements four or five kilometres from their schools is not considered when the financial position of the community in which the school is located is assessed, thus, drastically influencing the school's quintile ranking. Many of these learners attend schools located in more affluent communities. Considering only the economic status of a community when calculating the poverty score results in the school being placed in a higher category, and thus allocated less government funding.

No-fee schools are not allowed to charge school fees and the funding allocations should ensure that these poorest schools receive the largest per-learner allocations (Hall & Giese, 2009:36). This per-learner allocation for the various quintiles is determined by the Department of Education and published annually in the *Government Gazette* indicating the per-learner amount that should be allocated by provinces to schools in every quintile. In 2017 the allocations were as follows:

- Quintiles 1, 2 and 3: R1,177
- Quintile 4: R590
- Quintile 5: R204 (Xala, 2018).

The calculation of the specific school allocation can be summarised as follows: specific school allocation = per-learner amount X number of learners in the school.

It is intended that the allocations to these poorer schools should increase disproportionately over time compared to the allocations to the upper quintiles, creating an even distribution of the resources. These steps should alleviate the inequalities in education funding in South Africa. In contrast to these South African measures, Ladd et al. (1999:139) share some steps that the USA government took to overcome inequalities:

- redistribute state and local funds;
- increase state revenues and
- cap education expenditure in wealthy districts.

Additional financial sources

As government funding is often insufficient to run a school effectively, other sources of funding must be considered, of which the paying of school-fees are the most common. In terms of Section 39 of SASA 84 of 1996, if a resolution has been adopted by the majority of parents at a parents' meeting, the school may determine and charge school fees. Section 5(3) of the Act, however, explicitly states that a learner may not be refused admission to a public school based on the payment abilities of their parents. Parents who cannot afford to pay school fees may apply for partial or full exemption from school fees (Section 39 of SASA). The ANSSSF also states that learners from lower income families must be granted

partial or complete exemption and may not be denied admission to a specific school because of the parents' inability to pay school fees (Reschovsky, 2006:34).

The following formula (Bisschoff & Mestry, 2003:60) is applied to determine the fee exemption:

$$E = 100 \left(\frac{F + A}{C} \right)$$

Where,

E = school fees as a proportion of the income of parents/household;

F = annual school fees per child;

A = additional monetary contributions paid by a parent to a learner's participation in any programme;

C = combined annual gross income of parents/household;

100 = to convert the number in brackets into a percentage.

The answer obtained from applying this formula must be checked against a prescribed table which reflects the number of learners in the household, as well as the value of E.

The following are some of the possibilities read from the table:

- If E is equal to or greater than 10%, the parents qualify for full exemption.
- If E is equal to 3%, the parents do not qualify for full exemption, unless they have one or more children at the same school or at another fee-paying school.
- If E is less than 2%, the parents do not qualify for exemption. If E is equal to 2%, the parents do not qualify for exemption unless they have five or more children at the same school or at another fee-paying public school.

Physical facilities

The quintile ranking also affects the physical facilities at the school, which are vital for effective teaching and learning. The United Nations Scientific and Cultural Organization ([UNESCO], 2014) confirms that the school environment and facilities exercise a strong influence on learners' education. Building schools or extending existing buildings, as well as the maintenance of the buildings, are all capital expenses covered by the state. Worldwide, the significance of these activities to maintain school functionality is recognised and applauded (Albert Learning Facilities Branch, 2004, and Victoria State Government Department of Education, 2006, as quoted by Xaba, 2012:215). Keeping a record of the school's physical facilities and material resources, including furniture and equipment, as well as the maintenance thereof, are crucial. This data is used in the regular organising and managing of the school's activities and provides data from which many indicators for assessing the quality of education in the school may be derived (UNESCO, 2014).

The maintenance of facilities (as a part of capital expenditure) in the school context includes the repair, replacement and general maintenance of physical features on the school grounds, in the

school buildings and within the safety system of the school (Nhlapo, 2006:42). Facilities include buildings, grounds, and service systems. Service systems include access control, fire control, plumbing, waste disposal, sanitation, electricity, safety and security, and landscaping (Szuba, Young & The School Facilities Maintenance Task Force, 2003:75). The buildings refer to the foundation and the external walls of the building (Coll & McCarthy Architects, 1998, as quoted by Xaba, 2012:216). The school grounds include the grass areas, pathways, paved areas, trees, shrubs, planted areas, car parking, slopes, walls, fences, corridors, steps, and any unimproved grounds, as well as the playgrounds.

Although the funding for the facilities and the maintenance thereof is the responsibility of the state, the maintenance of schools is often neglected, and overcrowding is a prominent issue in many rural schools (Muthusamy, 2015). Xaba (2012:219) found that there are “poor systems for facilities maintenance inspection” and that these inspections were mostly conducted in an ad hoc manner, when equipment breaks down or becomes damaged. Participants in Xaba’s study also indicated that although the Department of Education allocated money to the school for maintenance purposes, it was not adequate. Participants further indicated that from the total allocation granted to the school, a mere 12% was for maintenance. One of the participants from a suburban school mentioned that from his R2 million budget, approximately R500,000 was allocated to maintenance. Xaba (2012:221) expresses the opinion that these suburban schools appear better maintained because they charge higher school fees than township schools. This is confirmed by Jacob and Ludwig (2009) who state that learners in poor and rural districts are more disadvantaged, and that learners in these areas continue to perform at a level inferior to learners in urban areas. From these studies it is evident that even in the maintenance of facilities, the lack of social justice in the education system needs to be recognised, acknowledged and rectified.

Although the provincial government is responsible for extensions to buildings and other renovations, maintenance, which depends on the urgency of such requests, is often neglected. To assist with planning and decision-making, the provincial education departments should “... maintain an accurate, prioritised, annually updated database of the construction needs of the school and undertake annually updated long-term projections of new school construction targets and funding requirements, based on these norms” (Mestry & Bisschoff, 2009:62).

Although this indicates that the building of new schools and additional classrooms are the responsibility of government, it appears that this task is often overlooked or neglected. Masemola (2010) reports that in March 2010, Tshwane alone needed 1,881 classrooms to ease the pressure of overcrowded pri-

mary and secondary schools. Considering the size of Gauteng, one of the provinces in South Africa, nearly 6,000 classrooms were required. Although this seems impossible to rectify, the Gauteng Department of Education has reportedly spent R4.4 billion from 2010 to 2014 to address the situation. It is hoped that the additional schools and classrooms will result in smaller class sizes as evidence supports that a “smaller class size at the beginning of school experience does improve the performance of children” (Mosteller, 1995:123). The children who were in smaller classes at the beginning of their school experience also performed better in later school years.

Research Questions

This article focuses to answer the following research questions:

Main question:

- How successful is the quintile ranking system in addressing poverty in schools?

Sub-questions:

- How does the quintile ranking advantage poorer schools?
- How does the quintile ranking impact the quality of education?
- How does the quintile ranking system influence the choice of schools?

Methodology

The quintile ranking system was implemented by government to assist in redressing the past financial inequalities regarding educational funding in South Africa. Although the quintile ranking system was aimed at ensuring a more equitable funding base for schools, the practical implications of its implementation created some difficulties for the various role-players, including school principals, parents, SGB members, and financial officers. The article aimed to identify problem areas resulting from the implementation of the quintile ranking system and the school fee exemption formula.

The philosophical doctrine that underpins this article is interpretivism, which usually attempts to understand the phenomena through the meaning that people assign to them (Maree, 2010:58). The quintile ranking system and the application of the exemption formula, although prescribed by government, are influenced by the social/school environment, the SGB’s interpretation of the parents’ financial status, and the parents’ willingness to apply for exemption, which makes this perspective applicable to the study. The parents need to decide whether they wish to apply for exemption and consider the implications of not applying, which reflects the human aspects incorporated in school funding, quintile ranking, and exemption from school fees. This indicates the human aspect within the study and thus reiterates the relevance of interpretivism. This search for new meaning in the field of equity in school funding makes the qualitative approach suitable.

The population for the study consisted of government schools in the Tshwane Metropolitan area. We used purposive sampling to select the participants. The schools were sampled from various Quintiles (1–5) and were also selected based on their location within the Tshwane Metropolitan Area. The selected schools were diverse in their financial situation, infrastructure differences, school size, and location. The authors selected both suburban and township schools. The principals, one SGB member, and the financial officers of eight schools were interviewed. A total of 24 semi-structured interviews were conducted.

The semi-structured interviews used in this study were transcribed, which entails converting the tape recordings into write-ups, by an independent transcriber. From the transcriptions, the researcher identified main and sub-themes. A detailed financial analysis was performed on the financial statements of the schools, including a ratio-analysis and comparison of figures with other entities, as well as previous financial years.

Ethical approval was obtained from the relevant Education Department as well as the ethics committee of the Faculty of Humanities at Tshwane University of Technology (TUT). An informed consent form was signed by participants prior to conducting the interviews. The purpose and details of the research, as well as its confidentiality, were explained in the consent form.

Findings

Quintile Ranking and School Status

A school's quintile ranking is of paramount importance as it determines the status of the school in respect of fees and funding. This ranking system, assessing the poverty indicators of the community where the school is located, may not always capture the poverty of the learner community accurately (Motala & Sayed, 2009:4). One township school has a Quintile 4 ranking, which implies that the community in which the school is located is relatively affluent. However, the principal at the school claimed that the assumption made when determining the poverty score is that the "... *community around the school bring their children to that school. The assumption is not true in the case of our communities.*" He mentioned that the parents of the school community who can afford school fees of a mere R300 per year, and can support the school financially, "... *do not bring their children here.*" According to him, the reason for parents taking their children to schools in wealthier communities is because of the poor quality of education in township schools. He added that "... *the complaint is that the quality of education in these schools is weak.*" Based on this response, the question could be asked: What has really changed in education in South Africa if a principal himself refers to the poor quality of education in poor town-

ship schools? The SGB of this school decided to apply for no-fee status.

Difference in Financial Status of Learners and School Environment

The challenges caused by incorrect quintile ranking are commented on by Chutgar and Kanjee (2009:18). They found that schools in Quintile 5 (wealthy schools) are better off than schools in Quintile 1 (poor, no-fee schools), although schools in Quintile 5 receive less funding than schools in Quintile 1. Quintile 1 schools are still worse off in terms of school resources and composition, which has a detrimental effect on the learning and teaching in these schools. In the study, which served as basis for this article, it was found that the schools in Quintiles 2, 3 and 4 may have greater needs for resources than schools in Quintile 1. That suggests that the quintile ranking system is to some extent wrongly identifying current Quintiles 2 to 4 schools (Van Dyk, 2014:53). In addition to this incorrect quintile ranking of the township school, which causes great financial hardship, a similar situation occurred at a particular suburban school. The school was located in a middle to upper class white area. The principal noted that, "... *our school situation is actually ridiculous – a black school in a white suburb.*" The learners at the school do not reside in the same area. Most of them commute from the nearby brown and black townships. According to the principal, the economic welfare of the learners is average to poor, in total contrast to that of the community in which the school is located. She added that, "... *we had exemptions of R1 million for the year.*" The data obtained both from the interviews and the literature review confirmed the shortcomings of the quintile ranking system.

Reasons for Choosing Schools

An SGB member participant commented that the reason for enrolling his children at a specific school was mainly based on the quality of education offered at the school. He confirmed that the learners commuted from other areas, thus, the community in which the school is located does not represent the community where the parents of these learners live. The principal's comments were supported by the SGB member's comments. Another factor that influenced the choice of this school, as opposed to other schools, was that it was located close to the main road to town and easier accessible to learners from other areas. Although this school's ranking does not correlate with the financial standing of the learners' parents, the principal prefers to keep the status quo regarding the quintile ranking of the school. Based on the poverty score of the community, the school was ranked as Quintile 5. If the financial positions of the learners' parents were taken into account, the quintile ranking might have dropped drastically. The

principal is, however, not interested in applying for an amendment to the quintile ranking. According to her, the ranking provides the school with some prestige and it is ranked the same as other predominantly white schools in the community. She mentioned: *“You know, on the one hand it gives you some prestige. I am in the same quintile as School X and that encourages parents to enrol their children at this school, because of the prestige.”*

Quintile Ranking and Quality Education

A principal mentioned that although transport was not freely available to and from his school, learners still preferred to attend. According to him, in spite of the transport challenge, *“... they have to be here because they have to obtain this education and have these privileges.”* According to both the SGB member and school principal, the decision to attend a school, which is not located in the area where the learners reside, is motivated by a desire to gain quality education. This could be an indication of how parents staying in townships view the quality of education in such areas. The location, from a quintile perspective, of these learners' residences, is completely different from that of the school under discussion. It appeared as if the quality of education in various township schools was regarded as inferior by more affluent black and brown parents, and learners. It is evident from the data that the disparity in quality of education between certain township schools and the more affluent schools in other areas constitutes a vast social injustice.

Ranking and Funding

The current unfair funding situation affects different aspects of the learning environment. Respondents specifically mentioned that the government allocation for the maintenance of infrastructure was inadequate to properly maintain the facilities. They further noted that the allocation was often less than 5 per cent of the amount required for maintenance. The financial officer at one suburban Quintile 5 school commented that *“... the school was allocated an amount of R600,000 per year. This amount is the allocation for learner support material, services, and maintenance. The municipal account of the school for one month could be as much as R123,000, while the cost of textbooks alone for one year amounts to R750,000.”* It is obvious from these figures that the government/departmental allocation is not nearly sufficient to cover the maintenance of facilities. The fee-paying schools in the sample supplement the maintenance allocation from the school fee income, however the no-fee schools are unable to carry out the maintenance required. The literature study confirmed the statements by the respondents. Xaba (2012:219) found that there are “poor systems for facilities maintenance inspection” and indicated that, although *“... the Department of Education allocates money to the school for maintenance pur-*

poses, it was not adequate.” The same view was shared by the respondents in the study on which this article is based. Xaba (2012:221) expresses the opinion that suburban schools appear better maintained as they charge higher school fees than township schools. From the literature review and the empirical study, it is evident that the lack of social justice may be recognised even in the maintenance of facilities in the education system. The difference between the financial capabilities of Quintile 1 and 5 schools is testimony of the fact that the current quintile system does not solve the equity challenge experienced by schools.

Basis for Maintenance Allocation

Finally, it should be noted that the respondents complained about the method of determining the amount allocated to maintenance. Currently, the maintenance allocation is based on the number of learners attending the school. This is a matter of concern, because the cost for the maintenance of a school building is not determined by the number of learners enrolled. The specific facilities and maintenance requirements for computers and technical laboratories at these schools should also be considered.

Conclusion

The current funding system affects the maintenance of schools, the access to learning and teaching support materials, and the personnel provision at schools, thus, compromising the overall attainment of educational goals.

The following conclusions can be drawn from the findings:

- The ranking system used to assess the poverty indicators of the community where the school is located does not always capture the poverty of the learner community accurately. Many learners from impoverished communities prefer to attend schools located in environments with a better financial status than their own. The poverty indicators of these two communities obviously differ.
- A lower quintile ranking is associated with education of poor quality.
- The reason for implementing the quintile ranking system was to bring equity to the financial status of schools. However, schools in Quintile 5, which receive less funding from the state are financially still better off than schools in Quintile 1. Quintile 1 schools are still worse off in terms of resources and composition. It further may happen that some schools in Quintiles 2, 3 and 4 have greater needs than Quintile 1 schools. The reason for this is that the current quintile ranking system allows schools to be ranked wrongly.
- Government maintenance of infrastructure is inadequate. The method of determining the amount allocated to maintenance is based on the number of learners attending, however, maintenance cost cannot be determined by the number of learners.

Recommendations

Our recommendations are based on the following understanding of educational equity: educational eq-

uity is achieved when justice, fairness, and inclusion exist in an education system, providing students with equal opportunities to learn and develop to their fullest potential (Minnesota Department of Education, 2019). Real educational equity should consider historical conditions and barriers that prevented learners from utilising learning opportunities and experiencing success, based on their race, income, and other social conditions. For the elimination of those barriers to educational opportunities, systemic change is required that allows for the fair distribution of resources and other support depending on the learners' needs.

Instead of an umbrella approach where schools are classified as belonging to different quintiles, where money is the focus of interest, rather follow a more focussed approach and identify educational needs.

- To address the issue of low quintiles being associated with poor education, the focus should fall on teachers and leaders and the development of the available people. Ensure equitable access to the best teachers for all learners.
- Improve conditions for learning. Aspects such as the school culture, school climate and social-emotional development of learners should be prioritised.
- Establish resource equity which refers to the allocation and use of resources (people, time and money) to create student experiences that enable all learners to reach empowering and rigorous learning outcomes (Minnesota Department of Education, 2019).

Authors' Contributions

HvD conducted the research as part of her D.Ed studies. Both HvD and TW worked on the article, adding additional information which was not included in the thesis.

Notes

- This article is based on the doctoral thesis of Helen van Dyk.
- Published under a Creative Commons Attribution Licence.
- DATES: Received: 6 February 2019; Revised: 2 May 2019; Accepted: 5 July 2019; Published: 30 September 2019.

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