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Critical Analysis of Funding Issues in Public Schools of KwaZulu-Natal

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Abstract: This article provides a comprehensive discussion and analysis of the funding issues faced by public schools in KwaZulu-Natal. The KwaZulu-Natal Department of Education is currently confronting significant financial hurdles that are adversely affecting schools across the region. Key issues include reduced funding, delayed payments, and a critical shortage of resources for essential supplies and infrastructure. As a result, schools are experiencing operational difficulties that undermine the quality of education for both educators and students, ultimately affecting the overall standard of learning. Employing an interpretivist approach and qualitative research methods, the study involved interviews with four union office-bearers and ten school principals who are actively engaged in the management of school finances. The findings indicate a clear financial crisis within schools in the province. Funds are disbursed in tranches, leading to instability as the allocated amounts prove insufficient to cover operational expenses and repay existing debts, resulting in a lack of basic resources. Many schools have accrued significant debts, leaving them uncertain about how to address these obligations. In some cases, principals have had to use personal finances to cover school expenses. To tackle these pressing issues, the study recommends a strategic reallocation of resources to prioritise critical areas in education, such as acquiring Learner-Teacher Support Materials, securing funding for necessary services, and ensuring that teacher retention remains a top priority. Additionally, school governing bodies should actively participate in fundraising efforts and implement cost-saving measures to support their institutions.

JEL Codes: H52, I22, I23, I24,

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1. Introduction

The National Department of Basic Education allocates funds to provincial departments of basic education, considering various socio-economic factors, leading to disparities in expenditure between affluent and impoverished provinces (Makoelle & Burmistrova, 2020). Consequently, provincial Basic Education Departments distribute these funds to schools within their respective provinces. Provincial



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departments received less budget compared to the previous years. Mestry (2020) asserts that globally, many governments are grappling with the challenge of adequately financing school education, resulting in adverse repercussions for educational quality. South Africa is no exception, as budget constraints have compelled the government to reduce education funding allocations.

The KwaZulu-Natal Department of Education is currently facing significant financial challenges, which are impacting public schools in the region. These challenges include diminished funding, delayed payments, and insufficient resources for essential supplies and infrastructure. As a result, schools are experiencing operational difficulties, ultimately compromising the quality of education for both educators and students, as well as the overall standard of learning.

The funding crisis extends beyond public schools to encompass circuit and district offices, affecting the education system as a whole. Over the past years, public education has reached the point of crisis, much of which is the result of provincial and national action. States have enacted massive funding cuts to education budgets and services since 2020 (Derek, 2017). The funding cuts reached levels that would have substantial negative effects on student achievement. Section 29(1)(a) of Chapter 2 of the South African Constitution (Act 108 of 1996) guarantees the right to basic education for all individuals. Furthermore, Section 34(1) of Chapter 4 of the South African Schools' Act (Act 84 of 1996) mandates the state to equitably finance public schools from public revenues to uphold learners' educational rights and address historical educational disparities. Regrettably, the KwaZulu-Natal Department of Education is failing to uphold children's educational rights due to inadequate and staggering funding. Specifically, for quintiles 1-3 schools, the department is required to provide R1602 per learner, yet it only allocates R955, resulting in a deficit of R647. Quintile 1-3 schools, characterised as economically disadvantaged and non-fee-paying, should be allocated more substantial funding per student. In contrast, quintile 4-5 schools, considered less economically disadvantaged, are receiving comparatively lower funding. As a result, they are permitted to charge school fees to cover the deficit. The majority of schools in KwaZulu-Natal are rural and fall under quintiles 1 and 2 categories, and cannot charge school fees and are not receiving funds allocation on time. The government claims to lack funds and is unable to provide basic needs to schools. As a result, schools are struggling to carry out their mandate of providing quality education. Despite the growing crisis in education caused by budget cuts, states have made minimal or no efforts to reverse the decline (Derek, 2017).

2. Historical background

Before 1994, South African schools were funded through a deeply unequal system that was racially segregated and discriminatory. White schools, the so-called Model C schools, were well-funded, with better infrastructure and resources, largely due to government subsidies and support from affluent communities (Jansen & Taylor, 2003). Whereas black schools were underfunded, with inadequate infrastructure, insufficient resources, and poorly trained teachers, reflecting the apartheid regime's discriminatory policies. At the time, spending on a white learner was four times that for an African learner; this was financially



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possible because of the apartheid-defined racial composition of the system (Hindle, 2007). This uneven distribution of school funding along racial lines meant that schools for black, coloured, and Indian learners had less money than those for white learners (Dass et al. 2016). The apartheid government's funding policies exacerbated educational disparities, limiting opportunities for marginalised groups. Schools lacked basic services, such as the supply of electricity, water, toilets, computers, and telephones. Previously, parents in public schools had to pay school fees to build classrooms, procure teaching and learning materials and hire additional teachers.

The post-1994 government worked to address these inequalities, increasing education spending and implementing policies to promote greater equity. The South African Schools Act provides that schools must be funded through public funds. To address past inequities in school funding, the Schools Act allows for certain schools in more affluent areas to raise their funds, while the government fully subsidises learners in poorer schools (Dass et al. 2016).

3. Human capital theory

The proponents of Human Capital Theory, Theodore Schultz (1902–1928) and Gary Becker (1930–2014), redefined education as an investment in human capital. Their hypotheses regarding the relationship between human capital accumulation and aggregate economic growth served as the foundation for arguments advocating increased funding for education. This argument posited that it was the responsibility of the federal government to provide the necessary funds. In the 1960s, Human Capital Theory was a significant driver of increased investment in education, linking education to economic development not only in developed nations but also in emerging independent nations of sub-Saharan Africa (Psacharopoulos & Woodhall, 1985). This theory has had a profound influence on education policy, prompting governments to take on a more active role in funding and regulating public education. According to Human Capital Theory, the primary goal of education is to enhance students' future productivity and earning potential. Economists, with their specialised knowledge, provide valuable insights into the educational process (Biddle, 2017). Therefore, Human Capital Theory posits that individuals can increase their productive capacity through acquiring additional education and skills. Despite the passage of time, Human Capital Theory remains a powerful tool in guiding national education policies (Oketch, 2014). The theory suggests that an educated population is more productive and that the more and better an individual's education, the better their financial rewards and the better the economy will do (Mlambo et al., 2021).

4. Research question

A crucial aspect of any study is the formulation of a research question, serving as a fundamental element in delineating the boundaries and course of the research (Muszynski, 2023). This question guides the systematic collection of pertinent information with the ultimate aim of drawing reasoned conclusions at a subsequent phase.



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The present study examines the financial constraints faced by public schools in the province of KwaZulu-Natal. The primary objective is to propose viable strategies that aim to alleviate this pressing issue. The articulated research questions are as follows:

- 1) What are the ramifications of financial constraints on public schools within the province of KwaZulu-Natal?
- 2) What recommendations can be put forth to address and combat the fiscal challenges experienced by public schools?

This academic pursuit endeavours to shed light on the implications of funding constraints within the context of public education, with the broader objective of offering constructive solutions to mitigate the identified challenges.

5. Method

The study adopted an interpretivist paradigm and utilised a qualitative research approach. Interpretivism underscores the idea that individuals are the authorities in their own experiences, emphasising the comprehension of subjective meanings and interpretations individuals associate with their experiences (Pretorius, 2024). Purposive sampling (Kumar, 2018) was employed to select ten (10) school principals actively engaged in the utilisation and management of school finances. Five principals are derived from primary schools, and the other five from secondary schools. Furthermore, two unionists, one from the South African Democratic Teachers' Union (SADTU) and the other from the National Teachers' Union (NATU). In-depth interviews were conducted with twelve participants. In this study, interviews are viewed as a collaborative relationship between the participant and the researcher (Fujii, 2017). Thus, a semi-structured interview guide was used as the data collection instrument. The semi-structured interviews enabled us to elicit participants' deeper understanding regarding how they responded to the funding crisis in public schools (Kvale, 2007; De Vos et al., 2011). Participants consented to the audio recording of interviews, and their responses were transcribed for data analysis. Following that, line-by-line coding (Silverman, 2013), involves re-reading each transcript line-by-line while marking certain words and phrases (codes) that were relevant to the key question driving this research. This was followed by the grouping of codes into categories, which was done by putting together all those codes that had similar meanings (Cohen, Manion & Morrison, 2011).

6. Results and discussions

The purpose of the study was to evaluate the effects of financial limitations in KwaZulu-Natal's public schools. Seven topics in all arose from the participants' experiences and viewpoints.



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6.1 Disbursement of school funds in tranches

The department has implemented a policy of disbursing school allocations in multiple tranches since 2020, rather than in one lump sum payment. This practice has had deleterious effects on the financial stability of schools, as the allocated funds are insufficient to cover operational expenses and outstanding debts. During recent interviews, several principals expressed their frustration over the delay in receiving school allocations for the year 2024/2025 and 2025/2026. One principal articulated, "The department still owes our school the 2024 allocation, and there is uncertainty regarding the payment for 2025." This sentiment was echoed by others, with one principal stating, *"We received our last funding instalment in November 2024 and are eagerly awaiting the final tranche of the 2024 allocation."* When queried about the timeline of their last allocation receipt, some principals disclosed that they last received their funding in November and others in October of the preceding year. Mestry (2013) contends that schools are struggling to implement the budget in the first term because the provincial departments of education deposit the money for the operating costs into schools' banking accounts rather late in the year, as the result, schools experience serious financial setbacks. This indicates the ongoing negotiations and concerns regarding the timely disbursement of school allocations. The principal's apprehensions underscore the urgent need for the department to address the outstanding payments and provide clarity on future allocations. Making matters worse, state budget cuts have been felt unevenly across the provinces (Derek, 2017). In KwaZulu-Natal, severe reductions in funding, along with inequitable funding practices, have pushed certain schools to the edge of disaster. Rural schools were hit particularly hard, with schools forced to cut essential services (Derek, 2017), including tests and exam administration, after-school programs, and other key functions, due to drastic financial.

6.2 Shortages of Learning and Teaching Support Materials (LTSM)

At the start of the 2025 school year, many public schools opened without learning and teaching support materials. Schools were unable to procure these materials, so principals used their salaries to purchase them. One principal said, *"Since the beginning of the year, I have been funding the school to purchase paper, toner, ink, and masters. My family complains about how I spend my salary, and they do not understand how the school interferes with family needs."* Another principal said that for the past six months, they have been purchasing LTSMs, such as paper, ink, and masters, on credit. However, no supplier is willing to sell to them on credit anymore. *"I have been buying on credit since 2023, and all the local suppliers are tired of us. Even when we receive our tranches, we are unable to repay all our debts. Instead, we rob Peter to pay Paul."* Lacking resources include textbooks, stationery, equipment, photocopying paper, stencils, toner, ink, and masters, as well as school furniture. The interviewed principal said, *"If we don't have photocopying paper, stencils, and toner, how will we administer exams?"* As a result, schools in the KwaZulu-Natal province have cancelled mid-year exams due to a lack of resources. Consequently, the major teachers' unions, namely, the South African Democratic Teachers' Union (SADTU) and the National Teachers' Union (NATU), began protesting against the Department of Education, demanding the immediate release of school funds to purchase LTSM. The study by Van der Berg (2016) revealed that there is widespread concern about the lack of LTSMs in both rural and urban schools, and this hampers effective teaching and learning. They also claim that a general shortage of appropriate learning



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and teaching aids exists in the majority of African Nations. Nqabeni et al. (2023) affirm that the problem of insufficient teaching resources has been recognised throughout the entire educational system, and these deficiencies may prevent learners from becoming proficient in their learning subjects.

6.3 Unpaid Suppliers

Schools are currently indebted to several local suppliers. Although the department negotiated agreements with these suppliers for the delivery of learners' stationery, outstanding payments remain unresolved. As a result, suppliers have begun to directly contact schools to recover the owed funds. One principal said, *"I am afraid to answer unidentified calls because I always think of the suppliers the school owe."* The other said, *"One supplier came to my house demanding his payment and threatened to confiscate my car if I didn't pay him."* According to the National Treasury, national and provincial government departments have repeatedly failed to pay their contracted suppliers timeously. The National Treasury has revealed that the state struggles to settle billions of rand owed in debt, and this tendency cripples the industry. The treasurer further stated that when these institutions do not pay their suppliers timeously, it often results in suppliers closing down, especially small, medium, and micro enterprises (Sindima, 2025). Cross-national studies have captured the negative effects of extended payment, late payment, and nonpayment. Suppliers have reported cash flow problems, which have led to difficulties paying their own suppliers, postponing investments in their operations, and freezing staff remuneration and hiring, all because customers did not pay on time (FSB, 2017; Ishak et al., 2019; Intrum, 2021).

6.4 Unpaid education workers

The unionists claimed that the department has not paid the grade R educators and is unwilling to pay acting allowances to office-based educators. *"They are asked to volunteer, and the department is not prepared to employ new staff members"*. The other union representative said, *"Grade R educators have not been paid since January, so they are not able to pay their bills."* The department's failure to pay grade R educators, acting allowances to Office-Based educators, and other education staff has significant and far-reaching consequences. According to Hameed et al. (2014), the value of employee training as a compensation and benefits package has increased the performance of human resource outcomes normally increases performance, satisfaction, and productivity also stay there and also attracts. This unpaid remuneration can severely affect the morale and motivation of educators, leading to decreased job satisfaction and potentially impacting the quality of education provided to students. Income security fears can lead to several negative consequences, including decreased satisfaction and a greater propensity to leave one's job (Zikanga et al. 2021). Educators who rely on these allowances and salaries for their livelihood may face financial hardship, which can cause stress and instability in their personal lives. Furthermore, such financial neglect can undermine trust in the Department of Education and its capacity to fulfil its responsibilities, potentially leading to increased absenteeism, strikes, or protests. Mugizi et al. (2015) argue that if employees lose faith in the dependability of the organisation, there will be a low level of job performance. These disruptions may result in interruptions to the teaching schedule, which



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negatively affect students' learning experiences and academic progress. In the long term, failing to adequately compensate staff can hinder the department's ability to retain qualified educators, resulting in a shortage of skilled personnel and negatively impacting the overall quality of educational services delivered to the community. It is imperative that swift action be taken to address these unpaid allowances and salaries, thereby restoring confidence, ensuring operational effectiveness, and upholding the department's commitment to its staff and students. The study conducted in Ethiopia revealed that more satisfied teachers are more committed to their job than less satisfied teachers are (Ayele, 2014). Many principals and teachers in this province are dissatisfied, and this destabilises the teaching profession.

6.5 Workshops and staff appreciation

The unionists reported that office-based education workers face challenges in attending national training sessions and meetings due to limited funds. They are also restricted to travelling only 1700 kilometres per month, which falls short considering the vast expanse of our province. Traditional professional development paths, such as conferences and workshops for teachers, were also affected by the lack of funding for schools (Zappala-Piemme et al., 2023). Teachers have to pay out of their own pockets to attend meetings and workshops. Consequently, the South African Democratic Teachers Union (SADTU) forbade its members from attending any department's meetings and workshops until the department settles schools' allocations.

Furthermore, the continuation of teacher appreciation initiatives, such as the National Teaching Awards, is in jeopardy due to the department's failure to secure funding for the organisation. As a result, the morale and performance of teachers are adversely affected. In a study conducted by Ibrar & Khan (2015), the effects of rewards on the job performance of academic staff at Malakand Private School were examined. The research findings indicated a strong, positive correlation between both extrinsic and intrinsic rewards and employees' performance levels (Ibrar et al. 2015). Workshops help teachers improve their skills and keep up with current teaching approaches, which may have been hampered by limited access to such opportunities (Mutesasiri et al., 2024). Consequently, they are unable to attend education workshops and meetings aimed at fostering professional development.

6.6 Extracurricular activities

Many schools are not participating in extracurricular activities due to insufficient funds, as school principals reported. *One principal said, "Our learners are not participating in extramural activities this year, since we do not have money to cover affiliation, transport and food expenses"*. The other principal responded as follows: "Learners participating in sports is healthy, hence the saying, a healthy mind in a healthy body". Pule (2007) contends that participation in sports contributes positively to students becoming more disciplined, setting goals, organising time, and developing self-confidence. However, a lack of adequate and/or sufficient funding has been associated with a decline in sports participation (Pule,



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2007). The lack of involvement in extracurricular activities by schools remains a pressing issue throughout the province.

6.7 Employment of school and office-based staff

The department has engaged in “silent retrenchment” processes, as there is a moratorium on filling vacancies for school clerks, teachers, security guards, and office-based educators. Some schools have no administration clerks and security guards due to resignations, retirements and attrition. One principal commented, *“When a security, cleaner, administration clerk or groundsman retires, resigns or dies, they are not replaced. The post is frozen. Securities, cleaners and administration clerks' positions were last employed in 2007, and not all schools were allocated these positions. For instance, my school was not allocated an admin clerk, cleaner and groundsman.”* The lack of adequate security measures in schools is posing a significant risk to the safety of teachers and learners, potentially exposing them to dangerous situations. When asked why some schools were not allocated these key positions, the response was that the department claimed it lacked funds. *“The department told us it had insufficient funds since then.”*

7. Conclusion

This study investigates the effects of inadequate funding on public schools in KwaZulu-Natal. Based on the feedback from the participants, we arrived at the following conclusions and recommendations: The funding deficits within the KwaZulu-Natal Department of Basic Education have substantial impacts on both the quality of education and its accessibility. Inadequate budgets have wide-ranging effects on essential services, including curriculum, maintenance, and staffing, within schools. The provincial education department has indicated that overspending on the compensation of employees' budget has hindered their ability to meet several priority areas, including staffing and the provision of necessary teaching and learning resources (Staff reporter, 2025). This situation results in increased workloads for officials and hampers the department's capability to monitor schools effectively, which in turn exacerbates the challenges faced by underfunded schools. Underfunded schools often lack extracurricular activities that engage students, which negatively affects the overall quality of educational resources and leads to diminished student retention. Gorton & Alston (2012) argue that for a school to improve the quality of education, enough resources should be available. This contention arises from the fact that the funds which the government apportion to schools are not sufficient to meet all educational needs (Botha, 2013). This has an adverse impact on the schools' capacity to deliver quality services to their learners (Vokes et al., 2015; Naicker et al., 2020).

8. Recommendations



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The study recommends a multi-faceted approach to address the financial crisis in KwaZulu-Natal public schools, including resource prioritisation, tender system reform, strengthened oversight, private sector collaboration, and strategic funding initiatives.

R1. Prioritising resources

The study recommends that the Department of Education and public schools should prioritise critical areas in education funding, for instance, the purchase of LTSM and payment for essential services. Purchasing of LTSM should be the top priority for both the Department and public schools. By prioritising resources, the departments and schools can better manage financial constraints and make the most of limited funds.

R2 Reform current tender system

The South African public procurement system is governed by a multitude of laws and regulations aimed at operationalising these principles and policy goals. The tender system in South Africa's education department has faced criticism for inefficiencies and corruption, leading to significant financial losses. Reducing or reforming the tender system could potentially save millions of rands and improve service delivery.

R3 Monitoring and oversight

Outsourced services often remain incomplete or unattended, yet are paid in full, due to inadequate monitoring and oversight. Enhancing monitoring and oversight of outsourced projects can help ensure quality service delivery, adherence to contractual obligations, efficient use of resources and accountability and transparency.

R4 Partnership with the private sector

Partnership with the private sector can help mitigate financial crisis by attracting investments and leveraging private sector expertise. By partnering with the private sector, the department and public schools can tap into their expertise, attract investments and alleviate funding constraints in education. This collaboration will ultimately yield a skilled workforce, driving economic growth and development.

R5 Fundraising

School Governing Bodies (SGBs) must also raise funds by encouraging donations from individuals, parents, businesses, and organisations to provide supplementary funding for schools and educational initiatives. Schools must prioritise their needs and apply cost-saving measures to optimise resource allocation and ensure long-term sustainability.



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