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Fundraising for financial sustainability towards the acquisition of teaching and learning resources in rural public secondary schools, South Africa

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Abstract

Fundraising is an important mechanism that can be used to supplement school funds. In this study I explored the school governing bodies' fundraising experiences in rural public secondary schools. However, school governing bodies (SGBs) are struggling to use fundraising to generate extra school funds. A qualitative approach within the interpretivist paradigm was adopted using systems theory. Three principals and school governing body chairpersons were purposively selected for this case study. Tesch's method of open coding was adopted to analyse data collected through semi-structured interviews. I observed ethical considerations to ensure the trustworthiness of the findings. Through the study I discovered SGBs' lack of knowledge and skills in fundraising, little involvement of stakeholders, and poverty in communities as factors hampering fundraising. These are shortcomings in the SGBs' approach to fundraising. I recommend suitable training for SGBs involving other stakeholders in fundraising, and adapting fundraising methods to the situations in their communities.

Keywords: fundraising; principals; rural; school governing body; schools; systems theory; training

Introduction and Background

Governments invest in human capital by funding education (Campbell-Green, 2021), which has been a priority to enhance productive economies for countries globally (Grant, 2017; Liu, 2018; Otieno, 2016; Rangongo & Ngwakwe, 2019). Basic and adult basic education are entrenched in Section 29(1) as a human right in the Constitution of the Republic of South Africa, 1996 (Republic of South Africa [RSA], 1996b). The right to education also forms part of many international statements on human rights (Goodier, 2017). The realisation of this right has come with huge financial demands that schools pose on governments (Organisation for Economic Co-operation and Development [OECD], 2008).

High economic inflation and recessions have adversely affected the economies of many countries across the globe (Hanushek & Woessmann, 2020; Jackson, Cora & Xiong, 2020; Mamabolo, 2020). When a country's economy gets affected, government departments, including the public education segment, suffer (Mkhize & Hungwe, 2022). When funds are insufficient in schools, the capacity to acquire the necessary teaching and learning resources is undermined (Geier, 2017; Ikediugwu & Ukeji, 2019). Globally, the allocation of funds to education has been affected by the incidences of natural disasters and diseases such as the coronavirus disease (COVID-19) (Adesua, Balogun & Adelakun, 2021; Căldăraru, Szekeres & Păunică, 2022; Du Plessis, 2020). These events have had an impact on education spending, preventing schools from reaching the performance targets required to achieve the United Nation's Sustainable Development Goal 4 (SDG4) (United Nations, 2022).

Wealle (2022) asserts that schools run by local authorities in England are the worst hit by financial pressures. However, Drayton, Farquharson, Ogden, Sibiet, Tahir and Waltmann (2022) declare that between 2010 and 2011 and 2019 and 2020, public education in the United Kingdom was confronted with a budget cut of 8% in total education spending. Comparing the budget allocations in 2019/20 and 2020/21 with the trend for the rest of the period indicated a decrease in the budget allocated to the sector by 5.4% from 2016/17 to 2019/20. Allegretto, Garcia and Weiss (2022) report that ever since the start of the recession in December 2007, budget cuts and defunding in the United States of America (USA) towards public education have been an ongoing issue and per-student education revenue plummeted and did not return to pre-recession levels for about 8 years.

Australia's public education expenditure also declined during the COVID-19 pandemic. Spending towards public education was reduced by nearly 2% from 2019 to 2020 (Henebery, 2022). In Uganda, the proportion of the education sector budget declined from 8.5% in 2018/19 to 8.2% of the total budget in 2020/21 (United Nations International Children's Emergency Fund [UNICEF], 2022). However, the Ministry of Education and Sports in Uganda revealed that the allocation for human capital development is set to reduce by 83.94 billion Shillings from the current allocation of 9.098 trillion Shillings for the financial year (2022/2023) to 9.005 trillion Shillings (UNICEF, 2022).

Borman, Selebalo and the Education Working Group of the C-19 People's Coalition (2020) indicate that the education budget in South Africa was reduced by one percentage point in the 2020/2021 budget based on the inflation rate in the aftermath of COVID-19. The result of this budget cut for education in 2022, meant a decrease in the quantities of learning and teaching support materials (LTSMs) per grade per child, the employment of additional teachers and other support staff, and the budget for school nutrition programme (Van Schalkwyk, McConnachie & Kota, 2022). This implied that schools were further plunged into a situation of

financial distress. Teachers, LTSMs and nutrition are the pillars for the provision of quality education in schools (Akhter, Khan & Rehman, 2018, Mkhasibe, Khumatake, Olaniran & Maphalala, 2020). This experience holds for countries such as Ghana, Nigeria, Tanzania, and Zimbabwe (Adesua et al., 2021; Gaddah, Munro & Quartey, 2016; Mutigwa, 2018). Inadequate funds impact negatively on the quality and quantity of resources that schools are able to acquire (Gaddah et al., 2016).

The South African National Treasury (2023) asserts that the budget allocation for the Department of Basic Education has increased at an average annual rate of 5.6%, from R29.7 billion in 2022/2023 to an average annual rate of 6.4% to R34.9 billion in 2025/26 (National Treasury, RSA, 2023). Despite this increment, the national development plan (NDP) shows insufficient provision of resources in schools in poor communities, and they are still inadequately funded through the *National Norms and Standards for School Funding* (NNSF) (National Planning Commission, 2012).

Mestry (2020) and Naicker, Myende and Ncokwana (2020) postulate that, due to inadequate funding, no-fee schools frequently experience shortages of funds well before the end of the school's financial year. Such inadequacy leaves schools with no option but to embark on fundraising. The purpose of fundraising in South African rural secondary schools is to augment the funds allocated to them by the Department of Education. However, the problems that school governing bodies (SGBs) in rural public secondary schools face is that the members lack knowledge and fundraising skills. Therefore, with this study I aimed to explore SGBs' experiences of fundraising in rural public secondary schools. The research question posed in this study was:

What are the fundraising experiences of SGBs in rural public secondary schools?

Literature Review

Adequate funding is a prerequisite for running daily educational programmes in any school (Ikediugwu & Ukeji, 2019). This implies that when the school does not have adequate funds, it would find it difficult to achieve its educational goals. Inadequate and unpredictable levels of government funding compel schools to adopt fundraising as a financial survival approach to augment their funds (Naicker & Ncokwana, 2016). Fundraising is not a new practice in school education and has taken on visibility not realised in previous decades (Miller, Lu & Gearhart, 2020).

Fundraising is a "persuasive activity of request that seeks to convince donors to contribute to a worthy cause" (Priante, Ehrenhard, Van den Broek, Need & Hiemstra, 2022:988). Fundraising

is a mechanism to sustain a productive education process and to ensure financial sustainability through additional revenue (Winton, 2019). This implies that fundraising can provide additional funds to the school to avert unexpected financial pressures.

Requesting donations is widespread in the world of public school finance (Geier, 2017; Skousen & Domangue, 2020). Donors can be individuals, companies or trusts (Du Plessis, 2020). Schools use traditional methods, and digital and social networks to request donations (Chapman, Masser & Louis, 2019). However, in rural public schools' traditional methods of fundraising are mostly used due to the illiteracy levels of the SGBs. In the United Kingdom, parent teacher associations (PTAs) raise funds from parents, and lease out premises for commercial use through sponsorship and businesses (Body, 2017; Wharton, Kail & Curvers, 2016). In Canada, 86% of schools are engaged in fundraising guided by school Regulation 612/00, the fundraising guideline (Winton, 2019). Funds are requested from sponsorships and by way of selling a variety of items to raise money (Waddington, 2018). The most popular fundraising method in Nigerian schools involves asking money from individuals, governmental and non-governmental institutions and organising various school events (Ikediugwu & Ukeji, 2019).

The South African government uses the policy on the amended national norms and standards for school funding to fund no-fee schools and fee-paying schools (Department of Education [DoE], RSA, 2006). This funding policy provides for a funding combination of income from the central government and external agencies through fundraising (Mestry, 2020). Sections 36(1) and 20(2) of the South African Schools Act (SASA) place the responsibility of fundraising on the SGB (RSA, 1996a). This legislation, provided for in Section 30(1), suggests that SGBs should establish committees, including an executive committee and a finance committee. The finance committee must further constitute a fundraising committee, incorporating teachers, learners, parents and community members who have useful fundraising skills (Mestry, 2020; Mpolokeng, 2017).

For fundraising to be effective, the members must have a well-grounded theoretical knowledge to underpin their financial management activities (Sebidi, 2023). Section 23(6), of SASA also dictates that SGBs may co-opt a member or members of the community to assist in dispensing its functions (RSA, 1996a). However, the committee must function according to the financial policy formulated by the SGB detailing the processes, procedures and guidelines to be followed when raising and handling school funds (Mestry & Bisschoff, 2009). Successful fundraising

methods that have emerged in rural schools include rent-a-hall, and selling snacks (Ngobeni, 2013). Another likely method may be for the school to buy school uniforms in bulk from the retailers at a discount to sell to the learners at a marked-up price. This method allows parents to buy their children's uniforms at a competitive price, while the school is making a profit.

SGBs and affected stakeholders should, therefore, invest time and effort for fundraising to succeed (Clarke, 2012). As suggested by Naidu, Joubert, Mestry, Mosoge and Ngcobo (2008), fundraising can be conducted by organising concerts, dances and sports days. Money acquired through fundraising activities may be used to fund extra teaching positions, other staff positions and to acquire extra resources (Posey-Maddox, 2016). Botha (2012) proposes that schools target industries, communities, parents, learners and staff to raise funds. Challenges, such as the unemployment of parents, poverty in households, child-headed families, and the literacy level of parents, hamper the success of fundraising (Mpolokeng, 2017).

According to Winton (2019) time constraints, unavailability of resources, lack of computer skills, and a lack of grant writing skills disable school governors from reaching out to donors. Winton (2019) further elucidates that most donors are affiliated with schools in affluent communities where it is a popular practice to advertise their businesses, something that rural public schools struggle to do. Despite growing interest in fundraising in education in rural secondary schools in South Africa, Mestry (2016) is of the opinion that lower quintile schools such as those in rural areas, are challenged to develop fundraising strategies to supplement their finances through fundraising activities, such as sponsorships and donations. However, there is inadequate literature that explores the lived experiences of the SGBs in rural public secondary schools regarding fundraising.

Theoretical Framework

This study is underpinned by the systems theory of Banathy and Jenlink (2004). Schools, as education organisations, depend on the funds and resources provided by the DoE to realise their educational success (Hillman, Withers & Collins, 2009). When resources are inadequate, the stakeholders responsible should find ways to augment the existing resources. Adopting systems theory provided a fundamental theoretical base for understanding fundraising in rural public secondary schools (Banathy & Jenlink, 2004; Von Bertalanffy, 1968). Schools as systems comprise principals, SGBs, parents, community members, the wider community, teachers and learners who should work together to assist schools to raise

funds in order to sustain themselves financially (Mestry, 2016). A school that isolates itself from its environment can be considered as a closed system that cannot attract resources from the environment (Lunenburg, 2010).

SGBs as custodians of fundraising in schools should serve as an agent that links the school with the important resources in the external environment. Therefore, they need to commit more time and effort to donor relations to upsurge donor allegiance to their schools. Kelly (2001) maintains that stewardship, understanding and skills are the most significant steps in the fundraising process. Therefore, SGBs need to adopt an entrepreneurial position towards complementing funds provided by the state (Buys, Du Plessis & Mestry, 2020). Fundraising processes should include feedback to one another, which can be used to correct paucities in the process and help to advance future fundraising success. I suggest that SGBs, as secondary resource providers, should play a prominent role in preventing the decline and the impoverishment of school resources.

Rural public secondary schools are self-managing and have an amount of decentralised authority and responsibility to make decisions on resource allocation within the centrally-determined framework (Caldwell & Spinks, 2013). They have the autonomy to decide on the kind of fundraising to engage in that will augment school funds and improve the quality of teaching and learning (Buys et al., 2020). Therefore, principals, parents, teachers and learners led by the SGBs should influence the external environment to raise funds for their schools (Mestry, 2016:4).

Methods

A qualitative approach within the interpretive paradigm was used to explore school SGBs' experiences of fundraising in rural public secondary schools (Cohen, Manion & Morrison, 2018). Through this approach, I discovered the relationship between participants and their environment (Yazan, 2015). The qualitative approach became a relevant method to identify the sources of income that schools use for financial sustainability. Three SGB chairpersons and three principals from rural secondary schools classified as Quintile 1 to 3 schools were purposively selected using a case study design (Maree, 2019). This design was adopted to establish an understanding of the complex fundraising experiences of participants in their own contexts (Buys et al., 2020).

Following Section 23(b) of the SASA, principals were chosen because they are ex-officio members of the SGBs and accounting officers responsible for managing finances (RSA, 1996a). The SGB chairpersons were selected because, according to Section 29(1), they are office-bearers

in the SGB (RSA, 1996a). Semi-structured interviews of 45 minutes duration were used to collect data from the participants drawing on their insights and personal experiences on fundraising conducted in their schools (Yin, 2018). All the interviews were audiotaped and transcribed at a later stage (Flick, 2022). Marshall and Rossman's (2011) and Neuman's (2014) standards for trustworthiness were used to test the trustworthiness of the research findings. Triangulation was ensured by comparing data collected from the interviews and the literature review (Gall, Gall & Borg, 2007). Credibility was ensured by involving participants in member checks to verify the accuracy of the data that they provided during the interviews. Transferability was accomplished by "associating fundraising initiatives of different secondary schools considering a participating school's exceptional context and generalising it to other public schools' circumstances" (Buys et al., 2020:4).

For the data analysis I followed Tesch's open coding method (Creswell, 2009). This involves the identification of themes, the use of coding into categories and the emergence of themes. Ethical research considerations were observed in this study (Van der Stoep & Johnston, 2009). A request to conduct research was sought from the Nkangala district and affected rural public secondary schools at Mamelhake circuit in the Mpumalanga province (Maree, 2019). Consent forms were distributed to all the participants, and participants were assured of anonymity and confidentiality of the information they would provide during the interviews (Cohen et al., 2018). The participants were also informed of their right to withdraw from the research without prejudice at any time (Cohen et al., 2018).

Findings

The following findings emerged from the study. Based on the ethical considerations of the study, principals were assigned codes P1 to P3 and SGB chairpersons C1 to C3.

Fundraising in Rural Public Secondary Schools

Fundraising in schools is propelled by the need to augment the funds provided by the Department of Basic Education (Mkhize & Hungwe, 2022). Section 36 of the SASA (RSA, 1996a) places the responsibility of fundraising on the SGB. Participants gave the following reasons why schools raised funds:

P1: Well, upon receiving [an] allocation from the department, we are already in debt because we spend money before it is allocated to us. The money from the department doesn't last us long; therefore, we have to raise funds to close the financial shortage gaps.

C2: Fundraising assists, although limited, we are able to augment learners' food because the department has reduced the supply ever since

2021. Fundraising also assist[s] us to sponsor teachers and learners' events.

P3: Well, we are able to buy textbooks and replace those that were damaged by the learners. Remember, without textbooks learning and teaching cannot happen effectively, and this will hamper learners' performance.

Submissions made by the participants revealed that schools raise funds to augment funds provided by the DoE. The findings also reveal that money from fundraising assists schools to augment the amount of food that the Department provides for learners, to buy textbooks to replace those that were damaged by the learners, and to sponsor teachers and learner events.

Methods of Fundraising in Rural Public Secondary Schools

Chapman et al. (2019) and Waddington (2018) suggest that fundraising to raise money for learners' education can be conducted by requesting donations from parents, learners, the community, friends, acquaintances and business organisations and by selling various items.

Naidu et al. (2008) add that schools may organise staff concerts, dances, sport days and learner concerts as part of their fundraising strategies. How participants should raise funds was expressed as follows:

C1: I cannot say we have ways of raising funds. We just think about what we can do to get extra funds because we were not trained. Sometimes we request donations from the business people and also organise casual days for learners to contribute a certain amount of money.

P1: We have established a tuckshop in our schools to sell items to the learners and teachers and issue out donation lists to the learners as a way of fundraising. However, we also ask parents and big businesses to donate cash and in kind to the school, but we lack training.

C3: Our school is not having prescribed ways of fundraising. Remember, no one has trained us on how to raise funds. We ask donations from the community, parents, learners and teachers and the local business people.

P2: Well, we are assisted by excursions and tours and sporting activities in our school. We charge learners extra money when we have to undertake one of these activities for us to raise funds for the schools.

The findings reveal that although SGBs are not trained to raise funds, they draw on their experiences and use methods such as donations from the community, parents, local businesses and learners, sell items for learners and teachers and arrange excursions, tours and sporting activities at schools.

Challenges of Fundraising in Rural Public Secondary Schools

SGBs are struggling to raise funds because of contextual factors such as their location and

community background, as well as a high level of illiteracy among the community members (Mestry, 2016). The responses by all participants clearly indicate that fundraising initiatives in all the sampled schools did not yield the desired outcomes.

C2: Eeh! We are unable to engage in a productive fundraising because we don't have [the] skills to do it. We don't know how to link with the big business out there using digital and social networks to ask donations.

P1: Big businesses are not interested in funding a rural school like ours. The last time when the committee was out to raise funds, one manager of a certain company clearly said that 'he can display his company's billboard in our school because it is like looking for a gold in the bush.'

C3: Well, the community in this village do not normally donate to our school. Remember, this school belongs to them, not only us. We are having over 500 learners, but when we ask parents to contribute towards fundraising, very few comply because they mention that they are not employed.

P2: Yeah, this is a big problem because local businesses in our area donate to schools where their children are attending. This is also done by the parents in this community. This gesture brings fundraising inequality of schools in this village.

C1: Stakeholders in our school are reluctant to fundraise. They claim that fundraising is time-consuming, not seeing how it is assisting the school because money fundraised is too little, and it also exposes learners to dangerous people and situations when they are requested to fundraise.

The findings reveal that SGBs lack fundraising knowledge and skills. Their fundraising initiatives are limited to their own setting because they cannot use digital and social networks to ask for donations. Participants also believed that there is a lack of parental involvement and community support for fundraising initiatives conducted in schools. In their endeavours to raise funds, they are discouraged by donors who are not interested in advertising their businesses in rural public schools. The poverty of the community members and the reluctance of stakeholders to raise funds were revealed as having a daunting effect when trying to raise funds. Participants also believed that donations made by local businesses and parents in rural secondary schools were selective and sectional in that they only donated to schools that their children attended and to schools where their relatives worked.

Enhancing Fundraising in Rural Public Secondary Schools

Mestry (2016) accentuates that SGBs should devise creative ways to attract funding to their schools. Therefore, it is significant for them to infuse an entrepreneurial approach in fundraising. When participants were asked how they could improve their fundraising approach, they responded as follows:

C1: Basically, we must use the existing government policies to be guided on how to raise funds as well as the modern technology to reach out the donors.

P1: Well, one has to admit that our approach of fundraising is too traditional. I think our principal must assist us to learn the new tricks of fundraising.

P3: We do not have to own the responsibility of fundraising. We have to work in collaboration with other stakeholders so that fundraising becomes an all-inclusive venture. I think there are a lot of people in the community having knowledge of technology on how to secure funds for their organisations. Remember, some of them have been trained; if not so, they might know someone who can assist us.

C2: If we want to attract funds to this school, we must go out and gather information from our colleagues to come and share on how better we can raise funds.

The findings reveal that rural public schools should use contemporary approaches to fundraising and make it a collective effort. Systems theory proposes that the principal, SGBs, community, parents, learners, and the business sector should work together to accumulate funds to acquire resources for the school to improve the education of all the learners. For fundraising success, SGBs should have financial policies to direct all the fundraising activities performed by the schools. However, the findings are pointing at the principals who, in terms of Section 19(2) of the SASA (RSA, 1996a), should render all necessary assistance to governing bodies in executing their functions.

Discussion

With this study I explored the SGBs' experiences of fundraising in rural public secondary schools. The study findings submit that rural public schools are struggling to raise sufficient funds due to a lack of knowledge, skills and the use of traditional methods. This concurs with Mestry (2016) that SGBs in rural public schools are not knowledgeable to raise school funds. According to the findings, funds raised greatly help to augment the amount of food provided by the Department of Basic Education, replace damaged textbooks and sponsor teachers' and learners' educational events.

Although SGBs in rural public secondary schools are not adequately trained to conduct fundraising, the findings reveal that the fundraising through donations from the community, parents, local businesses, and learners, selling items and also drawing extra money from excursions, tours and sporting activities organised in schools is not always effective. These findings are consistent with the suggestions made by Botha (2012) and Naidu et al. (2008).

The study reveals that fundraising in rural public secondary schools is negatively impacted by

a lack of skills for fundraising, the attitude of the community members, sectional and selective ways of making donations, poverty of the community members, and the location of their schools. These factors hamper efforts to conduct effective fundraising activities. The findings reveal that for fundraising to be successful, it has to be a collective effort. In line with the systems theory of Banathy and Jenlink (2004) and Mpolokeng (2017), the fundraising committee should not function in isolation, but incorporate teachers, learners, parents and community members who possess useful fundraising skills to assist.

Conclusion

Adequate funding forms the basis for realising the mission and vision of education in schools through teaching and learning. Funding makes it possible to acquire human and capital resources to enhance quality education. However, the findings of this study reveal that when the government continuously cuts the education budget, schools struggle to meet their day-to-day financial needs and are then obliged to engage in fundraising to bridge the funding gap. I recommend that the district must train SGBs on issues regarding fundraising including the use of digital and social networks to request donations. I further propose that SGBs involve stakeholders such as parents, community members, local businesses, teachers and learners in fundraising. This should be done by arranging meetings with these stakeholders to explain how fundraising should be conducted and the importance of fundraising to schools. I also recommend that principals should adapt the available fundraising methods to acknowledge and cater for poverty in communities. This adaptation should be made using fundraising methods such as “collect a can”, “collect a box”, “collect a bottle”, and offer services to the school to minimise expenses.

Notes

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