



**UNIVERSITY OF
KWAZULU-NATAL**

**INYUVESI
YAKWAZULU-NATALI**

**PARENT GOVERNORS' EXPERIENCES OF FINANCIAL
MANAGEMENT AT UMBUMBULU DISTRICT**

By

ZANDILE MSABALA

**A dissertation submitted in partial fulfilment of the requirements for the
Master's degree in Educational Leadership, Management and Policy, School of
Education, College of Humanities**

UNIVERSITY OF KWAZULU-NATAL

July 2024

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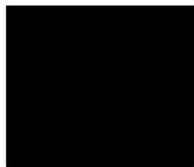
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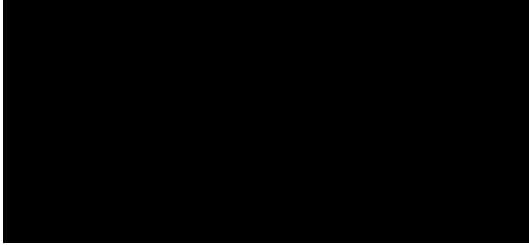
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This dissertation has been submitted with / without my approval.



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Date: 18: July 2024

14 June 2024

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Dear Z Msabala,

Protocol reference number: HSSREC/00003019/2021

Project title: From a parent to a financial manager: narratives of parent governors' serving in rural schools' finance committees

Amended title: From a parent to a manager: Parent governors' experiences of financial management at Umbumbulu district

Degree: Masters

Approval Notification – Amendment Application

This letter serves to notify you that your application and request for an amendment received on 10 June 2024 has now been approved as follows:

- Change in title

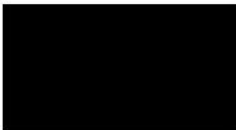
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Best wishes for the successful completion of your research protocol.

Yours faithfully



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DEDICATION

I dedicate this dissertation to my late parents, Nokuthula Msabala and Dumisani Msabala, who instilled in me the value of education and supported me tirelessly throughout my academic journey. Their unwavering love, guidance, and encouragement will forever remain in my heart. I owe my success in this academic endeavour to the sacrifices that they made. They believed in me even when I doubted myself, and their constant encouragement propelled me forward. Though they are no longer with me physically, their spirits remain alive in everything I do. Your memory will forever guide and inspire me as I embark on the next chapter of my academic and personal journey. I only hope I make you proud.

May your souls rest in eternal peace.

ACKNOWLEDGEMENTS

- Firstly, I would like to express my utmost gratitude to God. It is through His grace and blessings that I have been able to embark on and successfully complete this challenging academic journey.
- Secondly, I would like to express my heartfelt gratitude and appreciation to my supervisor **Dr. N.I. Jaca**; your professional guidance has been out of this world in helping me complete my studies. At times, I doubted my ability to finish, but your unwavering support made me carry on and you stood by me throughout the entire process. Your mentorship not only made this journey more enjoyable, but I also gained invaluable knowledge from your expertise. I am truly thankful for your patience, feedback, and belief in my capabilities. Your dedication as a mentor has had a profound impact on both my academic and personal growth. I am forever grateful for the opportunity to work under your guidance and will carry the lessons learned from you throughout my career. Thank you so much Dr. Jaca.
- Thirdly, I extend my heartfelt gratitude to my son, Sabelo Msabala, for his patience and understanding during the time when I had to juggle the responsibilities of motherhood and being a student. I am truly grateful for his unwavering support and the understanding he showed as I navigated the challenges of balancing these roles.
- Fourthly, thank you, Sli, Cmpo, and Lungisa, for being my rock and for your unwavering support throughout this journey. I am proud to call you my siblings, and I am grateful for the bond we share.
- Fifthly, I would like to extend my heartfelt appreciation to the Finance Committee from Umbumbulu Circuit for their generous contribution towards my studies. Their support has played a significant role in helping me pursue my academic goals, and I am truly grateful for their assistance.
- Lastly, I would like to take a moment to express my deepest gratitude to my best friend, Nqobile Shiba for the incredible friendship and unwavering support throughout my academic journey. Your presence in my life has been a constant source of joy, laughter, and motivation. Thank you so much my sister.

ABSTRACT

The South African Schools Act 84 of 1996 requires School Governing Bodies (SGBs) to take responsibility for the management of school finances. However, research has revealed that many SGB members in South African schools lack the necessary knowledge and financial skills to manage the school's finances effectively and efficiently. This qualitative case study explored the experiences of primary school parent governors in financial management in Umlazi District within the Umbumbulu Circuit. The study was conducted within the interpretivist paradigm and underpinned by participatory democracy theory. Data were gathered using semi-structured interviews with three participants who were purposefully selected from three primary schools in the Umbumbulu district. Thematic analysis was employed to analyse data. Findings reveal that the finance committees lack the necessary training that helps with an understanding of their roles and responsibilities in financial management; thus, support should be provided in ensuring that they understand their duties. It is therefore recommended that the Department of Education and other relevant educational authorities provide the necessary training and support to SGB members in schools to enhance their financial knowledge and skills. This can be done through workshops, seminars, and policy training programmes specifically designed to meet the needs of parent governors in financial management. Furthermore, the government should allocate sufficient funds to assist schools in improving their financial systems, including providing resources and tools for effective financial management.

Key words: Experiences, parent governors, school governing body, financial management, finance committee, national quintile, participatory democracy theory

LIST OF ACRONYMS	
DBE	Department of Basic Education
ECD	Early Childhood Development
FINCOM	Financial Committee
GAAP	Generally Accepted Accounting Procedures
HOD	Head of Department
NNSSF	National Norms and Standards for School Finance
PDT	Participatory Democracy Theory
RSA	Republic of South Africa
SASA	South African Schools Act
SDP	School Development Plan
SGB	School Governing Body
SMT	School Management Team

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CHAPTER 1

INTRODUCTION AND ORIENTATION TO THE STUDY

1.1 Introduction

The participation of parent governors in school governance is unquestionably one of the crucial responsibilities in education (Lekonyane & Maja, 2014). This has been noticeable through the implementation of educational policies that encourage parental participation in school management. The South African public-school sector is governed by the school governing body (SGB). SGBs are governance bodies set up in terms of Chapter 3 of the South African Schools Act 84 of 1996 (Act 84 of 1996) (SASA) to act as juristic persons by law (Motimele, 2021). Several countries have adopted laws that govern education, specifically incorporating parental involvement in school governance. The purpose of the parent component in school governance is to promote the democratisation of education (Beyers & Mohloana, 2015). This study assumed that parents, as important stakeholders in schools, should have the opportunity to participate in the decision-making process. This can be achieved by establishing the SGBs, where the number of parents must exceed the total number of other members with voting rights (Kruger et al., 2024). The purpose of this study was to explore the experiences of parent governors in selected primary SGBs, serving within the finance committee. This chapter begins with the background of the study, problem statement, rationale, and motivation for the study. The purpose statement, objectives of the study, research questions and a theoretical framework will be discussed. The research methodology, clarification of concepts, and study delimitation will be part of this chapter. This chapter will conclude with a brief summary of the chapter.

1.2 Background of the Study

This study focused on the experiences of selected primary school parent governors in financial management in the Umbumbulu District. In general, parent governors are individuals who have children attending a particular school and who are elected or appointed to serve on the SGB (Republic of South Africa [RSA], 1996). The primary role of the SGB is to represent the views of parents and to bring a parental perspective to the decision-making processes (Aina, 2017). The SGB plays a crucial role in managing primary schools effectively (Aina, 2017). Within the school, the SGBs are expected to establish general goals, objectives, participate in policy decisions related to administration, budget, and curriculum, and ensure accountability (Gurr et

al., 2012). According to Aina, (2017) other important duties of the SGB are to represent stakeholders, including parents, staff, and local community representatives, to ensure decisions consider their needs and values. They also participate in financial oversight to ensure the school stays within its budget and maximises resources (Aina, & Bipath, 2020). The SGB may also oversee hiring and evaluation of the principal or headteacher and other leadership team members. They also encourage continuous improvement in instruction and overall school performance. The SGB serves as a vital conduit between the institution, administrators, and the community, establishing strategic direction and ensuring the efficiency of school operations (Richards, 2021).

Through the SASA, democratically elected SGBs provide participation opportunities for parents and learners in underprivileged societies such as rural and township areas (Nojaja, 2009). The SASA also empowers finance committees with functions such as developing and implementing finance policies, drawing, and maintaining school budgets, as well as monitoring all expenditures and procurement within a particular school (Mestry, 2004). These functions have contributed to equity, efficiency, and enriched parental participation, ultimately leading to better cultures of teaching and learning (Duku, 2006). Baffour (2006) has highlighted that parents make up a significant component of SGBs in South African public schools.

The Ministerial Committee Review (2004) noted that these parents are expected to take on governing responsibilities regarding finances despite often lacking financial expertise. Motha (2003) further emphasises that finance is the primary responsibility of all governing bodies in South Africa but there is limited material on the way in which financial management and governance work. According to Mugala et al. (2023), the challenges faced by parents hindered their ability to make sound financial decisions, resulting in mismanagement of funds, poor financial planning and inadequate resource allocation. Studies by Mavuso and De Vet (2019) have also revealed that some parent governors relied excessively on principals and school management to make financial decisions, leading to a lack of autonomy and accountability. Moreover, the findings of that study by Mavuso and De Vet (2019) suggested that some parent governors faced pressure from other SGB members to prioritise certain projects over others; thus, leading to a misuse of funds. The challenges are more severe in primary schools where the gaps in parent governance are greater (Lugalo, 2017; Mestry, 2013). Such schools are

located in poor and underprivileged communities suffering from low income, high unemployment rates, and poor health and housing issues.

The Department of Basic Education (DBE) has not provided sufficient resources and support to SGBs, particularly in rural areas, to ensure that there is effective financial management in schools (Lugalo, 2017). Dlomo et al. (2022) and Mestry (2013) have criticised the SASA for paying more attention to the middle-class schools rather than the underprivileged schools when crafting the parental involvement. This then resulted in some communities, particularly in primary schools', parents depending more on educators and principals on matters of governance (Mavuso & De vet, 2019). Existing literature by Mavuso and De Vet (2019) indicates that the mismanagement of school funds is largely due to principals and the school SGBs in many schools not having good working relationships with stakeholders and lacking the necessary financial skills, more specifically in schools in townships and rural areas (Aina & Bipath, 2020).

The position of SGB members in rural schools has been questioned (Mestry & Govindasamy, 2013) because there are assumptions made by the SASA that they are all qualified and can afford personal time to spend on school activities that are not related to earnings and that they have resources to make choices about their children's education (Mestry & Govindasamy, 2013). Due to such shortcomings, the resulting perception is that school management is not following the mandate anticipated in the SASA (Mestry & Govindasamy, 2013).

The above-mentioned assumptions have brought about great debates in literature on goals that SASA has in governing the schools, particularly on power dynamics towards parent participation within finance issues and the educators (Lugalo, 2017). Amongst these power dynamics issues of social identities such as gender, tradition and politics within the school communities are seen to be stronger in privileged schools (Lockhart & Mollick, 2013). Teachers are noted to be more considered in school governance because they are more qualified than parents (Mohapi et al., 2018). This, amongst other issues, is emphasised as parents lack the experience and are then unfamiliar with school meeting procedures, leading to the principal dominating the parents in school governance (Mncube, 2009). In spite of the criticism raised above, there seems to be an overwhelming agreement on the importance of parental participation in school governance. Hence, this study, was conducted to seek an understanding of the experiences of parent governors within financial management as part of their role in SGBs in selected primary schools in the Umbumbulu district.

1.3 Problem Statement

Being a member of a school's governing body can be an intimidating and exciting responsibility. Ideally, when parent governors are elected as members of the finance committee, they should be regularly trained in order to be experts in what they do (Lugalo, 2017). The purpose of this study was to explore the experiences of parent governors in the management of school finances, with a special emphasis on those serving within the finance committees in primary schools. However, multiple research studies have found that parents, who are expected to take on governing responsibilities such as finance management, frequently face challenges in implementing and controlling finances in primary schools (Dlomo et al., 2022; Getahun, 2018; Lugalo, 2017; Mohapi & Netshitangani, 2018; Nkanyane & Schoole, 2020). Thus, these challenges limited parents' ability to make strong financial decisions, often resulting in misuse of funds, poor financial planning, and insufficient resource allocation. Some researchers, such as Mtika and Mwale (2020) and Nkanyane and Schoole (2020), have investigated these difficulties. According to Mugala et al. (2023), limited training from the DoE has also been identified as a major contributor to these challenges.

The existing gaps and challenges show a clear need to conduct further research on the experiences of the finance governors, specifically, the parents involved. Despite the roles and responsibilities stipulated in Section 20 and Section 21 status of the South African Schools Act (Act No. 84 of 1996) parent governors on the finance committee still indicate that they continue to experience major challenges in making financial decisions. By conducting this study and exploring the experiences of the parent governors, the aim was also to explore parent governors' understanding of their role, identify challenges parent governors face and the kind of support they require to manage school finances. This research has the potential to contribute to the development of programmes to support parent governors in managing school finances.

1.4 Rationale and Motivation for the Study

My interest to conduct this study was triggered by my personal experiences as a student teacher within the primary school system located within the Umbumbulu District. During teaching practice in a primary school, I had conversations with some of the parent governors. During our conversations, I asked them about their qualifications. I was curious whether they had qualifications to manage school finances. Their responses led me to conclude that their level of knowledge in terms of managing school finances was inadequate. I therefore started to

wonder how they managed to play their role in the management of school finances as required by the SASA (Lugalo, 2017). I also wondered how parent governors were accounting for the way finances were utilised in the schools, given their lack of formal education. In addition, Diamond (2015) investigated the role of parent members of SGBs in school financial management and found that there were many principals and school governing bodies who lacked the necessary financial knowledge and skills. Moreover, they were frequently placed under major pressure because they were unable to work on practical solutions to existing financial problems. This suggests that the lack of financial knowledge among school principals and governing bodies could have significant implications for parent governors in rural schools. These governors, who represent the parent community and contribute to governance, need access to resources and support to participate in financial decision-making processes (Diamond, 2015). In schools where resources are limited, it is crucial to equip the parent governors with the necessary knowledge and skills to address financial challenges (Lugalo, 2017). This could involve tailored training programmes, mentorship opportunities, or external expertise. Schools should also consider the unique economic and financial circumstances of their communities, as parent governors can provide valuable insights (Rangongo, Mohlakwana et al., 2016). Addressing these gaps can lead to more effective and sustainable financial management, ultimately benefitting the school community.

Rangongo et al. (2016) qualitative study investigated the underlying causes of financial mismanagement in public schools and focused on the perceptions of various role players in the Limpopo province of South Africa. Their study revealed a lack of knowledge of legislation and skills, poor monitoring and control of funds, unavailability of financial policies in schools, omission to act against culprits, and lack of honesty, openness, and trustworthiness. Onderi and Makori, (2012) also discovered that the experiences of primary schools' parent governors in financial management suggested that very few studies had been conducted in Sub Saharan Africa and within this area and this issue has not caught many researchers' attention. There are limited studies, if any, that have focused on the experiences of parent governors in primary schools especially in the Umbumbulu District. Therefore, this qualitative study focused on the experiences parent governors in the management of school finances at Umbumbulu District with the hope that the knowledge from this study may lead to the development of support programmes for the parent governors in primary schools.

1.5 Significance and the contribution of the study

This study explored parent governors' experiences of financial management in selected primary schools at the Umbumbulu District of KwaZulu-Natal province. It provided me with an opportunity to advance my understanding of how parent governors experience managing finances in primary schools. The findings from this study have a potential to assist school principals by providing valuable insights on the experiences of parent governors in financial management. It is also anticipated that the findings could lead to the development of developmental programs to support parent governors in schools. Another benefit for parent governors is that their voices will be concrete evidence of what they go through as they manage school finances. Lastly, this study adds to the existing body of knowledge by addressing the gap that exists in the relevant literature regarding parent governors' experiences of financial management.

1.6 Purpose Statement

The purpose of this research was to explore parent governors' experiences of financial management in selected primary schools at the Umbumbulu District of KwaZulu-Natal province.

1.7 Objectives of the Study

The following were the specific objectives of this research:

- To explore the parent governors' understanding of their role in the management of school finances.
- To understand challenges parent governors face in managing school finances.
- To understand strategies that parent governors use to address the challenges they face in managing school finances.
- To identify the kind of support that parent governors need to manage school finances.

1.8 Main Research Question

What are the parent governors' experiences of financial management in selected primary schools in the Umbumbulu district?

1.8.1 Sub-questions

- How do parent governors understand their role to be in the financial management of school finances?
- What challenges do parent governors face in managing school finances?
- What are the strategies that parent governors use to address the challenges they face in managing school finances?
- What kind of support do parent governors need to manage school finances?

1.9 Theoretical Framework

This study was underpinned by participatory democracy theory (PDT), a theory influenced by a participative and democratic management style which seeks to actively involve every member of the team in decision making (Buthelezi & Ajani, 2023; Smit & Oosthuizen, 2010). When forming a connection between this theory and the study, it ensures that the decision-making process is inclusive and transparent, in line with democratic principles. This could additionally encourage accountability and foster a sense of trust amongst the parent and the school community. The experiences of parent governors in financial management within primary schools in the Umbumbulu District are looked at in the study. PDT, then emphasises individuals' active engagement in decision-making processes that influence them, and became the theoretical framework used in this study (Jefferson, 2015). The use of PDT will allow me to analyse the participation of parent governors serving within financial management if they are included in financial decision-making processes that impact the education of their children and the school community as a whole.

1.10 Research Methodology

Research methodology refers to the systematic and logical approach used by researchers to conduct a study or investigation (Creswell, 2014). It includes the overall design, methods, procedures, and techniques employed to collect and analyse data to answer research questions or test hypotheses. Research methodology provides a framework for conducting research in a structured and organised manner, ensuring the trustworthiness of the findings (De Vos et al. (2011, p.127). It involves selecting appropriate data collection methods, such as surveys, interviews, observations, or experiments, and determining the sample size and sampling technique. Additionally, it includes data analysis techniques, such as statistical analysis or qualitative analysis, to draw meaningful conclusions from the collected data (Alharahsheh &

Pius, 2020). The research methodology also addresses ethical considerations and ensures that the research is conducted in an ethical and responsible manner.

1.10.1 Research Paradigm

This research study was conducted through the interpretivist paradigm. An interpretive paradigm aims to focus on understanding the subjective experiences and meanings of its participants (Creswell, 2014). Therefore, an interpretive paradigm seemed appropriate for this study because it did not predict the parent governors' responses but rather allowed them to describe their experiences within their financial management roles and allowed me to understand their view of their world and the meaning they attached to it.

1.10.2 Research Approach

This research employed a qualitative approach. This approach was appropriate as it allowed me to gain an in-depth understanding of how parent governors experience the management of school finances in selected primary schools at Umbumbulu District (Creswell, 2012). Qualitative research involves the collection and analysis of non-numerical data, such as interviews, observations, and documents (Busetto et al., 2020). In the context of this study, this approach enabled me to use semi-structured interviews. The qualitative approach also allows for a rich description and interpretation of the data, providing a comprehensive understanding of the topic (Aspers & Corte, 2019).

1.10.3 Research Design

According to Nieuwenhuis (2010), a research design refers to a plan that is motivated by philosophical assumptions which guide the researcher when selecting participants and collecting and analysing data. In this study, a case study research design was employed as it allowed for an in-depth examination of a phenomenon in its real-life context which, in this case were three primary schools (Yin, 2017). Furthermore, case studies provide researchers with an opportunity to examine and present the descriptions of each phenomenon in detail within its context (Rashid et al., 2019).

1.10.4 Target Population

The target population for this study was parent governors in primary schools in the Umbumbulu District. Parent governors are individuals who have been elected by the parents of students to

serve on the SGB (Jefferson, 2015). By focusing on parent governors, the study aimed at gaining insight into the experiences of those who are directly involved in the finance committees.

1.10.5 Sampling Procedures

Sampling refers to selecting a sub-group of people from a larger population in order to represent a particular population. In the context of this study a sub-group of parent governors was selected to represent the larger group of parent governors (Creswell, 2012). A purposive sampling technique was used to select participants who had experience in financial management within their respective SGB finance committees. This meant that participants were selected based on their knowledge of the phenomenon which was the management of school finances (Creswell, 2012). I aimed to include a diverse range of parent governors in terms of gender, age, educational background, and years of experience. To achieve this, I made sure that a varied selection of parent governors was included in the research study, specifically both males and females with different age ranges, educational backgrounds, and a combination of those who had been in the position for a long time and others who were new to it. Thus, I managed to get many different of viewpoints and experiences from parent governors.

1.10.6 Data Generation Methods

Data was generated through semi-structured interviews. According to Creswell and Poth (2016), a semi-structured interview is a qualitative research technique in which an interviewer poses open-ended questions pertaining to a pre-established subject or series of subjects. This method provides flexibility, allowing the interviewer to explore additional areas of curiosity and to delve into more in-depth responses.

1.10.7 Data Analysis

The data generated from the interviews were transcribed and analysed using thematic analysis which involved identifying patterns, themes, and categories in the data and organising them into meaningful groups (Creswell & Creswell, 2018). I engaged in a process of coding and categorising the data to identify key findings and insights related to the experiences of parent governors in financial management.

1.11 Clarification of Concepts

To ensure correct terminology in this study, below is a definition of key concepts:

1.11.1 School Governing Body

The School Governing Body (SGB) is a structure composed of elected members, including parents, educators, nonteaching staff, co-opted community members, and the principal, that is responsible for governing the school and ensuring its effective management, with a primary focus on the provision of quality education (Makhumula, 2020). According to the SASA (1996), the SGB is an essential structure in the country's education system, and its members are expected to fulfil their duties and responsibilities as defined by the Act (Makhumula, 2020). The SGB's role in promoting effective school governance has been widely researched, with recent studies examining the impact of SGBs on school quality (Kapp & Bryan, 2019; Mthokozisi, 2020) and the challenges encountered by SGB members in fulfilling their responsibilities (Ali-Nakyea et al., 2019). This body of individuals aim to work together to promote the wellbeing and effectiveness of the school community and thereby enhance teaching and learning (Bayat, & Rena, 2014). This board of stakeholders is elected tri-annually through a democratic process. This body determines the policies that govern the school, and the principal is the main member in the implementation process.

1.11.2 The South African Schools Act

The South African Schools Act no. 84 (SASA) (1996) is a regulation that prescribes how schools should manage their funds (Makhumula, 2020). It also provides guidelines for the SGB and the principal on their roles and responsibilities in managing school funds. School principals experience multiple challenges as they execute their roles and responsibilities in managing the school finances (Kapp & Bryan 2019).

1.11.3 Financial Management

Financial management is understood as the use of financial information, skills, methods to make the best use of the organisation's resources (Mestry & Bisschoff, 2009). It is made up of activities such as planning, directing, organising, controlling, and monitoring the financial activities of an organisation (Samson, 2018). For financial management to be effective it must use a system made up of the following criteria: clearly defined duties of the financial manager(s), with a clearly aligned budget that meets with the school's vision, monitoring

systems, financial control processes, and an efficient recording system with a clear procurement method that is substantiated by an effective bank account operation (Mestry, 2013). Bush and Heystek (2003) also state that financial management certifies that the spending of the school finances is done through using money positively and applying proper procedures regarding access and allocation of resources. Lastly, financial management is also a procedure that identifies financial needs, collects funds and presents financial results (Zengele, 2013).

1.11.4 Finance Committee

A finance committee is a subcommittee of the SGB responsible for overseeing the financial operations of the school and ensuring the proper allocation of financial resources to support the school's objectives and goals (Samson, 2018). The finance committee plays a crucial role in financial planning, budgeting, reporting, and monitoring to ensure that the school's financial affairs are transparent and in compliance with relevant legislation. According to the SASA (1996), the finance committee is responsible for, among other things, managing and controlling the school's financial resources and making recommendations to the SGB on financial matters (Lekonyane & Maja, 2014). Recent research on school governance has highlighted the importance of an effective finance committee in promoting school financial stability and accountability (Makhumula, 2020; Tachie-Menson et al, 2020). Furthermore, the SGB may delegate in writing the responsibility of managing the finances to the finance committee (FINCOM). Some of the most important functions of the finance committee are to develop and implement a finance policy within the schools; to draw up a budget being guided by this policy and to control the school's budget making sure that all the procurement is done through correct quotation and tendering procedures (Bush & Heystek, 2003).

1.11.5 National Quintiles

South African public schools are categorised into five groups, called quintiles, based on the socioeconomic status of a school. Quintiles are determined by measures of average income, unemployment status and general literacy level in the school's geographical area (Makhumula, 2020). Schools in the most economically disadvantaged (poorest) geographical areas are categorised as Quintile 1 schools and those in the most economically advantaged geographical areas (wealthiest) as Quintile 5 (White & Van Dyk, 2019). Schools in Quintiles 1 to 3 are non-fee-paying schools and receive more funding per learner from the government than schools in Quintiles 4 and 5 (White & Van Dyk, 2019).

1.12 Delimitation of the Study

The study focused on parent governors of SGBs in selected primary schools and explored the experiences of parent governors who serve on the finance committee in three selected primary schools. A delimitation in research is a restriction or scope that the researcher establishes in order to focus the study's focus (Du Plooy-Cilliers et al., 2021). It serves in providing a clear outline of the subjects and themes not addressed by the study. This method will help me define what is required for the usefulness of the research findings and ensures that the study can be carried out and relevant.

1.13 Outline of the Study

Chapter 1: This chapter introduces the study and achieves that by presenting the background of the study, problem statement, rationale, and motivation for the study. The purpose statement, objectives of the study, research questions, theoretical framework, research methodology, clarification of concepts, and study delimitation is discussed. This chapter concludes with a brief summary of the chapter.

Chapter 2: This chapter focuses on the review of literature relating to parental governors' involvement in the finance committee of the SGB. Several themes are discussed, namely, the parent governors' understanding of their role, understanding the challenges parent governors' face in their participation in the financial decision making in primary schools, the strategies parent governors use to address the challenges they face in the financial decision making and, lastly, the kind of support that parents need to participate in the financial decision making. To close the chapter, a theoretical framework underpinning the research study is discussed.

Chapter 3: This chapter explains the research methodology that was used to conduct this study. This includes research objectives, research paradigm, research approach, research design, sample and sampling procedures, data generation methods and procedures and the analysis of data. The chapter also gives a detailed discussion of the measures taken to ensure the trustworthiness of the study as well as ethical considerations and the study's limitations.

Chapter 4: This chapter focuses on presenting, analysing and interpreting data from the participants. It also discusses the research findings and their alignment with the existing body of knowledge in the literature

Chapter 5: This final chapter presents a summary conclusion, recommendations, limitations and delimitations of the study. Finally, recommendations are made for future studies on this research topic.

1.14 Chapter Summary

In this chapter, the background of the study and the problem statement were discussed, as were the rationale and motivation for the study. The purpose statement, objectives of the study, research questions and a theoretical framework were provided. The research methodology, clarification of concepts, study delimitation was also part of this chapter. This chapter concludes with a brief summary of the chapter. The next chapter, Chapter 2, will focus on the relevant literature and its connection to the study, along with a detailed explanation of the theoretical framework used to guide the research study.

CHAPTER 2

LITERATURE REVIEW AND THEORETICAL FRAMEWORK

2.1 Introduction

Chapter 1 provided a detailed overview the research study. In this chapter, the literature review contextualises the research by connecting it to prior research conducted by experts in the relevant field. Bertram and Christiansen (2014) and Creswell (2014) highlight that in a research project, the literature review serves multiple purposes. Firstly, it shares with the reader the findings of previous studies that are closely related to the current research. Secondly, it links the current investigation to more extensive studies that have been done on the same research topic. Thirdly, it attempts to identify gaps in existing literature and extend prior research. Fourthly, it establishes the importance of the study within a scholarly framework. Finally, it provides a benchmark for comparing the study's results with those of other studies. Books, journals, articles, education policies, legislative acts, and print media related to the experiences of parent governors who serve as financial managers in selected primary schools are reviewed. The parent governors' understanding of their role in financial decision-making in primary schools, the challenges that parent governors face in their participation, the strategies they use to address these challenges, and the nature of support that parents need to participate in financial decision-making, are also discussed.

2.2 The School governing Body According to the South African Schools' Act

The SGB is an elected governance structure found in public, private, or independent schools, operating under the framework of the SASA, specifically as outlined in sections 23 and 28 (Beyers & Mohloana, 2015). The SGB's primary purpose is to oversee the school's governance in alignment with the DoE's policies (Diamond, 2015). As per Section 28(f), of the South African Schools Act the number of SGB members within a school is determined by the school's student enrolment (Beyers & Mohloana, 2015). Section 31 of the Schools Act stipulates that SGB members are elected once every three years and, as a result, they serve for a three-year term (RSA, 1996). The policy regarding the size of an SGB can be a concern if the number of enrolled students experiences a significant increase within the three-year term as it may lead to an imbalance in the SGB's representation (Nonyane, 2016). According to Section 16 of the Act, SGBs are responsible for formulating and adopting policies for the school, including language policies, admission policies, and disciplinary policies (Diamond,

2015). Such policies must be consistent with national and provincial education policies. Harber and Mncube (2013) have argued that providing training to SGB members is crucial to guarantee the successful accomplishment of their established objectives. These scholars further state that if each member is introduced to the specific responsibilities and expertise of their fellow members upon joining, it enhances the effectiveness of SGBs in carrying out their duties. Additionally, it has been observed that SGB members may lack functional literacy to meet the demands of reading and drafting policies, as well as managing and comprehending legislation, as noted by Heystek (2011).

In accordance with Section 38 of the South African Schools Act, SGBs also bear the responsibility for overseeing the school's finances (Dibet, 2015). They are tasked with creating the school's yearly budget, distributing resources among various programmes, and ensuring the efficient and productive utilisation of financial assets (Gallie, 2021). Further, another function of the SGBs is the appointment and termination of staff which is explained in Section 20 of the South African Schools Act (Owen, 2016). SGBs also have a role in the selection of educators at the school, actively participating in the recruitment process and providing recommendations to the Head of Department (HOD) (Ali-Nakyea et al. 2019). Additionally, they may also be involved in disciplinary proceedings, which may include proposing the dismissal of staff. According to Section 22 of the South African School Act, SGBs are engaged in decisions concerning the school's curriculum (Ali-Nakyea et al., 2019). They hold the authority to offer input on the choice of textbooks, educational materials, and the subjects to be offered at the school (Owen, 2016).

Furthermore, SGBs are expected to participate in crafting a school development plan (SDP) (Sibanda, 2016). The SDP serves as a strategic blueprint for the improvement and progress of the school (Sibanda, 2016). Section 8 of the South African Schools Act states that SGBs bear the responsibility of cultivating a secure and orderly school environment (Nkanyane & Schoole, 2020). They develop codes of conduct and disciplinary procedures and take measures to ensure the safety of both students and staff (Nkanyane & Schoole, 2020). In the case of *Scheepers v School Governing Body, Grey College Bloemfontein and Others* (Suid-Afrikaanse Onderwys-Unie Intervening) the court held that a governing body is required, in terms of 18(2)(b) of the Act, to meet with parents, learners, educators and other staff at least once every year. Section 18(2)(c) and (d) also obliges a governing body to keep minutes of its meetings, which it must make available for inspection by the HOD. Section 21 of the Act

states that SGBs are actively encouraged to involve parents, guardians, and the local community in the school's affairs. Their role is to foster a sense of shared ownership and collaboration in the school's activities. Further, SGBs are answerable for providing reports on the school's performance and financial management. These reports are submitted to the HOD, parents, and the broader school community.

2.3 The Allocation of School Funding in South African Schools

Many governments around the world play a crucial role in financing education, with the objective of providing high-quality education, fostering a fair society, and supporting a profitable economy (Beyers & Mohloana, 2015). In South Africa, the government prioritises the provision of quality education by allocating funds to various aspects of educational institutions, including schools (Gigaba, 2018; Gordhan, 2016; UNICEF, 2017/2018). In South Africa, the legislation governing school finance mandates the provincial government to distribute allocated funds from the central government to schools according to the National Norms and Standards for School Funding (NNSSF) Policy (Mestry, 2016). Typically, these schools receive funds directly deposited into their bank accounts by the provincial government (Diamond, 2015; Mathlwale & Erasmus, 2015).

The above-mentioned legal framework for school finance is administered in South Africa by the NNSSF, which is mostly based on quintiles. To fill historical educational gaps, schools are also categorised into quintiles (Dibet, 2015). The government examines the economic standing and infrastructure of the areas that surround the schools and categorises schools based on poverty rankings, which are used to identify them nationally. It is significant to remember that 20% of all students, not 20% from each province, are represented in each quintile (Diamond, 2015).

In line with Section 40 of the SASA, parents are responsible for paying fees at schools that charge fees, and this money is used effectively in quintiles (Diamond, 2015; Mathlwale & Erasmus, 2015). Thus, the SGB must understand school quintiles and how schools are funded in the South African education system. It is the responsibility of school financial managers to ensure that all finances are handled effectively and efficiently. However, financial management in schools is not without challenges, even for school parent governors.

2.4 Composition of the School Governing Body According to the South African School's Act

The SGB is composed of various individuals democratically elected every three years, including, but not limited to, an ex officio member (usually the principal), parent component, non-teaching staff, educator representatives, and learner representatives (Ali-Nkyea et al., 2019). Parents or guardians of learners at the school make up the majority of SGB members (Dibete and Potokri, 2021). They are elected by parents at the school. Section 20 of the SASA outlines the election process (Dibete, 2021). Educator members can be elected by their peers or appointed by the principal, as per Section 20. Non-educator staff, such as administrative or support staff, can also be elected to the SGB or appointed by the principal as per section 20 (Seroto, 2021). A limited number of community members who are not parents or guardians may be co-opted onto the SGB to provide expertise or represent the broader community's interests. In high schools, learner representatives may be included on the SGB. These representatives are typically elected by the student body, as stipulated in Section 22 of the SASA (Seroto, 2021).

However, if a parent is employed by the school, they should not represent other parents in the governing body (Mxuma, 2016). The SASA also specifies that co-opted stakeholders who are not parents of learners have no voting rights (Dibete, 2021). According to the National Guidelines for SGBs (DBE, 2018), a "parent" is defined as a biological or adoptive parent, legal guardian, or someone with legal custody of a learner who takes on parental responsibilities regarding the learner's education. An "educator" is someone who provides professional education services such as teaching or therapy, while "staff members" are non-educator individuals employed under the Public Service Act (DBE, 2011). It is notable that there is formality in the legislation around selecting members of the SGB in order to promote school excellence. These democratically elected members should be willing to work as part of a team. The SGB also has committee portfolios, and the chairperson of the committee is an individual member who leads the finance committee, and their signature is required for any financial or bank activities that are taking place. The treasurer is responsible for handling and record keeping of the financial records of the school. They also ensure that the budget is formulated according to the needs of the school and oversee financial reporting and financial decision making (Mxuma, 2016). Lastly, the principal is the main head of authority who is accountable for the overall school perspective of the financial decision making and also part

of the signatories who receive notification of the funds that are being generated towards the school.

2.5 Functions of the School Governing Body GB Members Based on the South African Schools Act

The SGBs stand in a position of trust towards the schools they govern, as stipulated in Section 16 of the SASA, while Sections 20 and 21 of the Act clearly outline the functions of SGBs (Mxuma, 2016). It is under these functions that each stakeholder plays a specific role as stipulated by the same Act and other relevant policies. From the financial perspective, the roles and functions of SGBs include managing the school fund, maintaining a single bank account for the school, creating a yearly budget for approval by parents, and submitting audited financial statements to the relevant provincial DoE (Dibete, 2021). SGBs are also tasked with purchasing educational materials and equipment, paying for services, raising funds, collecting school fees, and deciding on requests for exemptions from school fees, as well as managing and supervising the school's property, buildings, and grounds (Sibanda, 2017). The opening and closing times of the school should also be determined by the SGB and these must be consistent with any applicable conditions of employment of the school staff (RSA, 1996)). The Act also empowers SGBs to adopt a school constitution, decide if the school can be used for community purposes, and apply for additional roles such as formulating the school's curriculum and extra-curricular activities (Makhumula, 2020). The principal is responsible for the school's timetable, the admission and placement of learners, and any educational activities that support teaching and learning.

The SGB's role is also to develop the mission statement of the school, which serves as the core values that guide the school (Makhumula, 2020). The mission statement should aim to provide the basic foundation of the schools' culture, and it must be clearly communicated to all stakeholders such as teachers, staff, parents, learners, and the community as a whole (Sibanda, 2017).

The SASA Section 20(1) mentions two important roles for SGBs: to promote the best interests of the school and strive to ensure its development through the provision of quality education for all learners at the school (Rangongo, 2016). Therefore, the SGB needs to work together with the principal, educators, and other staff members of the school towards their professional functions. Section 36 of the SASA, as well as Section 5(1) of the 2001 Education Laws' Amendment Bill (RSA, 2001) strengthens Section 20 of the SASA in that an SGB of a public

school must take all reasonable measures within its means to supplement the resources supplied by the state in order to improve the quality of education provided to all learners at the school (Rangongo, 2016).

2.6 Functions of School Governing Body Based on Literature

Having considered the roles and responsibilities of SGBs from the education law perspective, it is also important to consider what researchers have unearthed. Many researchers (Dlomo et al., 2022 and Mestry, 2019) indicate that SGBs have a variety of duties with the primary goal of assisting schools in fulfilling their teaching and learning responsibilities. According to Mphethi (2016), the SGB is assigned various tasks, including the maintenance and improvement of the school's infrastructure, such as buildings and sports grounds. They are also responsible for procuring necessary resources and equipment like textbooks and stationery. Moreover, the SGB is expected to manage the payment for services provided by the school. Squelch (2001) maintains that the SGB, standing in a position of trust towards the school, has a duty to act in good faith and not engage in any unlawful conduct or behaviour that may jeopardise the interests of the school. This ensures that the school functions in line with educational and other laws and the reputation of the school is kept intact.

The mission of the school is also determined by the SGB in order to ensure that there is a clear instruction on how to achieve the school goals (Mphethi, 2016). Adopting a code of conduct for learners and the admission process of the school is one of the roles taken by these board members. It is thus essential for the SGBs to operate within the guidelines of the SASA and comply with relevant laws in order to effectively govern the school. Therefore, the most important role for the SGB is to carry all laws and regulations of education supplemented by resources provided by the DoE in order to get the best quality education to all enrolled learners (Van Leeve, 2014).

As the most important and productive unit in education, the main core business of schools is teaching and learning, and this can be achieved through good management of school resources to achieve the educational goals (Mestry, 2016). Schools in South Africa need to take full responsibility for controlling school finances taken up by the SGBs together with the school principal as an employee of the state (Mohapi & Netshitangani, 2018; Naidoo & Mestry, 2017;

Prinsloo, 2016). It is the principal's responsibility to provide appropriate financial advice in alignment with the legislation governing the schooling system (Quan-Baffour & Arko Achemfuor, 2014). The SGB is held responsible for any financial activities performed by the school, and the principal serves as the accountable officer. The SGB has a vital role in effectively governing the school and ensuring compliance with relevant laws, including the SASA), according to Ndou and Menlah (2015). To govern effectively, the SGB needs to be open to ideas and suggestions from other SGBs in the area, working together as a team and making decisions based on school policies and legislation. In carrying out financial responsibilities, schools usually formulate committees that are responsible for particular tasks.

2.7 The parent governors' understanding of their financial management roles

The finance committee in every school plays a crucial role in ensuring excellence in management of financial assets. According to Mestry (2016), the financial management responsibilities of the school governors and school managers should clearly be defined, because of its responsibility for managing all financial matters, it is essential that parent members of the finance committee have a clear understanding of their roles (Mestry, 2019). It is also important to unpack the roles as per the title within the finance committee, although these may depend on the school's needs and governance structure. Dlomo et al. (2022) have discussed the roles of the finance committee according to their portfolios, emphasising that the finance team members should work collaboratively in order to effectively play the financial role and implement financial plans of the school.

The finance committee's roles include implementing and establishing financial policies, developing, and managing the school budget, overseeing expenditures, obtaining necessary approvals, and ensuring adherence to procurement procedures (Prinsloo, 2016). These financial tasks are crucial in providing the necessary resources for effective teaching and learning to take place smoothly.

As outlined in Section 38 of the South African Schools Act, schools must prepare annual budgets detailing expected income and expenses. The SGB, including parents, plays a significant role in developing, approving, and monitoring the budget. Parents contribute to budget discussions, ensuring that resources are allocated effectively for the benefit of learners (Prinsloo, 2016). On financial records, Section 42 of the SASA state that public schools must maintain accurate financial records. Parents should support the school management team

(SMT) in keeping financial records transparent and accessible for audit purposes (Dlomo, et al.,2022). The SGB, with parental involvement, oversees and controls the expenditure of the school to ensure that funds are spent in line with the approved budget and in the best interests of learners. Section 39 of the South African Schools Act (SASA) addresses the issue of donations and fundraising. Public schools may receive donations, bequests, and fundraising income. Parents often take the lead in organising and participating in fundraising efforts to supplement the school's budget. The SASA allows schools to establish a reserve fund in Section 38 (Sibanda, 2017). The SGB, including parents, decides how to use and invest the reserve fund to benefit the school (Gallie, 2021). Parents, as part of the SGB, contribute to the development of financial policies, including investment policies and policies related to school fees (Gallie, 2021). These policies are essential for effective financial management (Owen, 2016). Public schools must undergo annual financial audits as stated in Section 42 of the SASA. Parents, through the SGB, are responsible for selecting the auditors and ensuring that audit recommendations are implemented. The SGB, with parent participation, sets school fees in accordance with the Act and regulations (Owen, 2016) Parents must be involved in discussions about school fees to ensure affordability and accessibility for all learners (Mestry & Bisschoff, 2009).

2.8 Challenges of School Governing Body Parent Governors Towards Financial Management

SGBs in rural schools face various challenges, including a lack of skills and unclear roles and responsibilities, as highlighted by Bayat et al. (2014). Sibanda (2017) emphasises that many parents in rural schools feel marginalised in decision-making processes led by school principals. In education settings, there are specific challenges related to marginalisation and lack of communication among parents and the school. Communities often encounter unique challenges that impact educational opportunities. These challenges include limited access to resources such as finances and infrastructure, difficulties with transportation, limited training opportunities, poor working relationships between parent governors and principals, inadequate monitoring of finances, insufficient understanding of policies, and a lack of parental involvement (Mtika & Mwale, 2020; Nkanyane & Schoole, 2020). These challenges facing SGBs are discussed individually in more detail below.

2.8.1 Poor Access to Resources

In order for an organisation to operate effectively, having access to resources is essential. Getahun (2018) supports this statement by highlighting that institutions, organisations, and corporations need adequate resources to function and to improve their performance. Educational administrators must utilise the available resources to achieve organisational goals. Parent governors in schools face challenges in managing finances due to limited funds, limited population, and inadequate infrastructure (Nkanyane & Schoole, 2020; Zindoga, 2016). They must work with the limited resources at hand to ensure schools operate adequately and provide quality education (Makhumula, 2020). Effective financial management plays a significant role in utilising financial information and employing different approaches to optimise school resources (Rangongo, et al., 2016). Poor planning, organising, directing, monitoring, and controlling of financial activities can result in misappropriation of funds, improper use of finances, or diversion of funds from essential school projects (Crouch & Winkler, 2008). Financial management is a skill that ensures efficient allocation of resources within organisations.

Insufficient resources for example, lack of laboratories, libraries, and classrooms, can cause delays in school openings (Mwila, 2023). Furthermore, some schools in certain areas have substandard facilities, and it remains uncertain whether the budget allocated to these fee-free schools is sufficient to provide quality education (Mwila, 2023). Some challenges arising from insufficient resources include low staff salaries due to poor learner enrolment, as funds from the DoE often experience delays (Chrisantous, 2013). The high poverty levels in these areas significantly impact the quality of education provided by the staff.

The school heads, in collaboration with the SMT and school boards, are responsible for financial management (Getahun, 2018). Funding in these areas often flows directly from the finance committee, with the treasurer managing the school's accounts. To address these challenges, the school finance committee needs to be aware of the resource shortages as part of the financial management process.

2.8.2 Limited Training Opportunities

Parent governors in primary schools often lack sufficient training and support from the education department to effectively fulfil their roles and responsibilities (Mohapi & Netshitangani, 2018). This study highlights the importance of providing adequate training and

support to newly appointed SGB members in rural areas, enabling them to actively engage in school governance. The DBE (2015) also asserts that insufficient training for school governing bodies can give rise to numerous issues as members may not have a comprehensive understanding of their roles, responsibilities, and legal obligations. Consequently, this can result in ineffective administration, misguided decision-making, and a lack of accountability within the schools.

Inadequate training in financial management within SGBs can lead to errors in terms of handling the school's finances, improper financial practices, and difficulties in tasks like budgeting and financial decision-making (Ramnarain, 2015). Additionally, without sufficient training, SGBs may face challenges in navigating regulatory frameworks and ensuring compliance with educational policies and regulations due to a limited understanding of these rules (National Education Collaboration Trust, 2017).

This implies that training plays a crucial role for the SGB, enabling members to gain a comprehensive understanding of the roles, responsibilities, and the expectations placed upon them. It equips them with the necessary knowledge and skills to effectively perform their duties and fulfil their responsibilities as instructed. Training ensures that SGB members are well prepared to make informed decisions, carry out their governance functions, and contribute effectively to the overall functioning and success of the school ((Mohapi & Netshitangani, 2018). The success of SGBs in managing school finances also requires good working relationships amongst members (Mestry, 2019). Poor working relationships are likely to hinder the success of SGBs in effectively executing their financial management duties.

2.8.3 Poor Working Relationships Between the Parent Governors and the Principals

Research suggests that schools experience poor working relationships between parent governors and school principals. According to Vally and Napier (2019), some of the challenges between the parents and the principals are often a result of the lack of parental involvement in the decision-making process. With this being said, the SGB as a whole may face difficulties in addressing conflicts within the SGB (DBE, 2015). Other researchers contend that principals and parent governors of schools do not work together effectively (Cunningham, 2020). Lack of communication may be the main barrier in improving the relationship between parent governors and school principals, causing insufficient regular and

open dialogue, misunderstandings and miscommunication that can impede the decision-making process. Principals typically do not create procedures for true teamwork to enable parent governors to take part in school governance. These difficulties become particularly evident in free public primary schools in townships and rural areas. However, a gap in the financial management of fee-paying public primary schools in wealthier urban regions was also found, confirming that they experience the same challenges (Alina, 2017).

According to Brown and Wilson (2020), key challenges that are often experienced between the parent governors and the principals is lack of collaboration, differences in perspective, lack of communication and perceived lack of influence. When parent governors and the school principals are unable to work together, it becomes challenging to develop and implement financial strategies that are in line with the basic needs of the school (Cunningham, 2020). This lack of collaboration can cause inefficiencies in the use of available resources and missed opportunities for financial improvement (Brown & Wilson, 2020). Differences in perspective when it comes to financial management often leads to poor financial management because parent governors may see other areas of spending and improvement as the top priority, whilst the principals may focus on other aspects (Cunningham, 2020). These differences can cause tension and disagreement, making it challenging to make informed financial decisions. Lastly, the perceived lack of influence may cause parent governors to feel that they have little or no influence in the financial matters. This feeling that their input is not valued or taken into consideration can strain the relationship and create a sense of frustration. To overcome these poor working relationships, it is important to improve communication, foster collaboration, develop shared understanding, build trust and collaborative partnerships. This can enhance their financial abilities and help make more informed financial decisions.

2.8.4 Poor Monitoring, Control, and Accountability for School Finances

One of the challenges evident within the financial management portfolio is poor monitoring, control and accountability of school finances in SGBs (Prinsloo, 2016). Several factors contribute to these challenges, including insufficient balances and lack of awareness and engagement (Rangongo et al., 2016). Regarding insufficient balances, there are often weak internal controls that may lead to poor financial monitoring and accountability (Gallie, 2021). Unequal separation of duties, inconsistent financial reporting and lack of oversight can often

lead to major opportunities of fraud, misuse of funds and other financial irregularities (Gallie, 2021).

School representatives may experience immense pressure to handle their schools' finances successfully (Mestry, 2018). However, the SGB members may sometimes not understand their roles and responsibilities within the portfolio of financial management, and some may not be fully engaged in the monitoring process of the school finances. This can often lead to lack of accountability and oversight regarding budgetary decisions and financial transactions. It is thus important to note that the financial management roles must be laid out in detail in order to ensure successful school financial decision making.

2.8.5 Lack of Participation on the Part of Communities in Education: Parental Involvement

Parental involvement in public education has always been an important component (Jeynes, 2016). The major function of parental involvement in schools is to assist with improving student learning with the goal of school excellence. In order for a school to succeed, parents must be involved in the process and provide valuable feedback, but many educational leaders, such as principals and parent governors, have failed to implement effective practices that redefine the concept of parent involvement (Sheldon & Jung, 2020). These practices normally include helping children at home with learning, attending schools' events, volunteering in the classroom and being part of the school governing bodies (Dibet, 2015). The lack of community participation in education, particularly parental involvement, may hinder the attainment of successful educational outcomes (Diamond, 2015).

Another factor that may lead to lack of parental involvement in communities in education is time constraints (Desimore & Daviso, 2020). Many parents face demanding schedules due to work responsibilities, household chores and other commitments, leading to poor attendance of important meetings. These can be SGB meetings that are held at the invitation of the school principal when there are important, sometimes pressing, matters to discuss (Sheldon & Jung, 2020). Limited availability of time can often make it challenging for parents to be involved even in the decision making. It is thus important to have flexible work arrangements or sacrifices in other areas of their life that often be difficult to manage.

Lastly, school-related factors can also affect parental involvement (Henderson & Mapp, 2020). The lack of effective communication and collaboration between schools and parents

can create barriers where parents feel unwelcome, not respected or excluded in the educational process. This can often lead to a decrease in participation and less interest in the school activities, causing parents to have little or no interest in the school issues.

2.8.6 The School Governing Body's Lack of Cooperation with the School Management Team

According to Magano et al. (2017), learners' performance is impacted by dysfunctional SGBs in South African primary schools. Bagarette (2012) critiques the SGBs' and SMTs' cooperation in light of many instances of power struggles related to the principals' greater understanding of policies and procedures compared to parent governors. It is important to remember that in public schools, managers are in control of professional management (Xaba & Nhlapo, 2014). This suggests that the employer's interests are taken into consideration by the principal, who has a duty to defend them. It is thus important that the principal support the SGB in carrying out its duties and obligations in relation to policy and law. Mncube and Mafora (2014) state that there is uncertainty regarding the roles of the SMTs and SGBs because the legislated functions do not provide a clear distinction between them. As a result, there are overlaps in responsibilities, and school governing members may attempt to be involved in the professional management of the school (Mphethi, 2016). This unclear boundary leads to lack of cooperation with each other on their roles and responsibilities (Nkanyane & Schoole, 2020).

According to Onderi and Makori (2012a), if SGBs exert excessive power, they may interfere with matters pertaining to professional education or school governance support. In contrast, the principal, as the leader of the SMTs, holds a dominant role in governance responsibilities. However, Doty (2012) argues that both SMTs and SGBs have faced challenges, leading to increased tension and strained relationships between the two leadership roles. This strain further adds to the pressure they experience. Moreover, Bayat et al., Louw and Rena (2014) and Maile (2002) suggest that certain SGBs in rural communities are not functioning effectively due to inadequate skills and unclear roles and responsibilities. This perception of unequal treatment between wealthy and educated parents compared to those who are poor and uneducated can negatively impact the quality of education and contribute to poor academic performance (Pomerantz et al., 2007). When parents believe that their involvement and input are not valued or that privileged families receive preferential treatment, it can create a sense

of inequality and disengagement (Mphethi, 2016). This can lead to decreased motivation and participation from parents, resulting in a lack of support and resources for the school community (Nkanyane and Sehoole (2020). Ultimately, this can have a negative impact on the overall quality of education and contribute to poor academic performance among students.

2.8.7 Failure to Understand the Legislation Underlying the Management of Finances

The SASA 84 of 1996 clearly outlines the major roles of the SGBs. However, a lack of understanding of the legislation behind financial management is a significant difficulty that SGBs in schools might encounter (Mtika & Mwale, 2020; Nkanyane & Sehoole, 2020). Primary school SGB members may lack adequate information or training on the legal system and financial laws that govern school budget control. This can result in improper management of funds, noncompliance with financial policies, and potential resource misuse. Lack of knowledge regarding the legislation behind financial management can also lead to a lack of transparency and accountability in financial decision-making processes (Sibanda, 2017). SGB members may struggle to successfully monitor and regulate the school's financial activities if they do not understand what is expected of them. Furthermore, a lack of financial knowledge and expertise may hinder SGBs' ability to make informed financial choices that are associated with the mission of the school (Nkanyane & Sehoole, 2020). It may also hinder their ability to effectively handle resources and prioritise projects that help in the development of student educational results ((Nkanyane & Sehoole, 2020).

To solve this issue, it is critical that SGBs in schools have proper financial management training and support (Getahun, 2018). This could include financial regulations and obligations workshops or seminars, as well as access to tools and guidance documents that clarify the laws advising on the use of school funds ((Mohapi & Netshitangani, 2018). SGB members can improve their ability to fulfil their financial tasks and contribute to the organisation by enhancing their awareness of the regulations governing financial management.

2.9 Addressing Challenges of Parent Governors

Effective financial management is indeed crucial for achieving the aim of providing high-quality and inclusive education. Several studies have highlighted that the mismanagement of school funds, particularly in rural and township areas, can be attributed, in part, to inadequate

financial management skills and strained relationships between principals, SGBs, and stakeholders (Ogbonnaya & Awuah, 2019; Prinsloo, 2016). This present research study utilised a qualitative research approach and employed a case study research design to investigate the experiences of parent governors serving in SGBs regarding the financial administration of public primary schools. By examining these experiences, the study aimed to gain a deeper understanding of the challenges and dynamics surrounding financial management in these schools.

Lack of training programs for members of SGBs can have negative implications for the strategic planning and execution of their roles. This can make it challenging to effectively determine the direction of the school and monitor progress (Ramnarain, 2015). To address these challenges, it is essential to provide training and capacity-building programmes for SGB members (DBE, 2015). These programmes should focus on various topics such as roles and duties, financial management, policy understanding, communication, conflict resolution, and strategic planning (National Education Collaboration Trust, 2017; Vally & Napier, 2019). Ongoing and customised training is recommended to enhance the effectiveness and efficiency of SGBs in their governance responsibilities (DBE, 2015). With proper training, SGB members can be better equipped to fulfil their roles and contribute to the improvement of schools. Lack of financial support makes it difficult to obtain a high-quality education, but when finances are mishandled, the situation becomes even worse ((Mohapi & Netshitangani, 2018). Schools have goals and objectives because they are organisations. The school funds need to be carefully managed to accomplish these objectives (Zengele, 2013). For successful financial management in schools to be achieved, understanding what it implies and adhering to legal standards when making financial decisions are essential (Aina, 2017). According to Mestry (2019), school financial management is the execution of managerial tasks related to the financial phases of schools to deliver excellent education. Effective financial management is described as a system with the following components in place: Clear roles for the financial manager(s) include a well-defined budget in line with the school's objectives; monitoring systems; an active financial control procedure; a thorough and appropriate recording system; a suitable procurement strategy; and efficient bank account operations with proper bank balance and accounting record reconciliation (Mestry, 2019).

To achieve efficient financial administration, applicable financial management and accounting regulations, such as Generally Accepted Accounting Procedures (GAAP), should be used

while handling school money (Mestry & Bisschoff, 2009). This is to ensure that standardised guidelines and practices about financial statements are handled, ensuring accuracy and clarity in the accounting procedures. Mestry (2019) asserts that the managers and members of the school governance committee should have a clear understanding of their roles in financial management. Having the background knowledge required to fulfil their financial management duties is also essential for the school's financial role players. Members of SGBs must comply with the following obligations under Section 20 of the SASA: to support the principal, teachers, and other school staff; to encourage the best interests of the school and try to ensure its development through the provision of quality education for all learners at the school; to develop and implement a constitution; to develop the school's mission statement; and to adopt a code of conduct for students at the school (Mestry, 2019). Below are the support needs that are required by the parent governors in order to manage schools accordingly.

2.9.1 Support Needs of Parent Governors

Parent governors play an important role in ensuring that schools are led properly; however, they need support to fulfil their duties effectively. These support needs can vary, but generally includes a number of strategies (Baker, 2018): training in order to understand their roles and duties and being given sufficient information and proper guidance from the school, which includes information on curriculum development, school improvement plans and student achievement data. Receiving mentoring and coaching from the school principals, especially when newly appointed as part of the SGB, can assist parent governors to understand the complexities of school governance and provide advice where necessary (Campher 2020).

Networking opportunities can be another form of support needs from the SGBs building networks with SGBs from other schools where they share experiences and develop each other to enhance their effectiveness as school governors (Campher, 2020). Having access to resources, such as documents and policies, to make informed decisions is also important; these can be provided by the schools or the local authorities. Parent governors should also have effective communication channels with the school leadership, other governors, and staff (Mosala & Mofolo, 2016). Clear and consistent communication allows for SGBs to understand school developments, give input, and raise concerns. Lastly, it is necessary to have a school environment that is supportive where parent governors feel important and included in the most

crucial decisions being made by the school management and includes participation during meetings and being part of the committees and the decision-making process.

Although the manner in which the parent governors receive the above-mentioned support varies across different schools and local authorities (Baker, 2018), it is vital that they have access to these stipulated support needs or a combination thereof. Local authorities and governing bodies often have dedicated teams or officers responsible for providing support to school governors, including parent governors (Campher, 2020). Additionally, training programmes, workshops, and online resources are commonly available to equip parent governors with the required knowledge and skills (Mosala & Mofolo, 2016). Ultimately, the support needs of parent governors should be recognised and met to ensure their effective contribution to school governance and improved outcomes for students Mosala & Mofolo, 2016).

2.9.2 Support in Collaboration with the School Financial Management

Collaboration plays a vital role in the South African education system by fostering partnerships and enabling effective cooperation among different stakeholders, such as principals, finance committee members, and SGBs (Richards, 2021). In order to achieve both short-term and long-term goals, it is argued that collaboration is essential. When SGB members lack the necessary skills and knowledge for effective financial management of schools, the SMT can offer support. By establishing mutually beneficial relationships and understanding between principals, parents, and teachers, collaboration enhances the efficient utilisation of educational resources to benefit the school and students (Campher, 2020). Every school appoints a finance committee that supports the SGB's tasks, and which is especially involved in school financial matters. According to Campher (2020), in order to carry out the provisions of section 30(1) of the SASA, the SGB may form ad hoc committees, such as finance and fundraising committees, that can collaborate and help them in decision-making in order to promote beneficial school financial management (Richards, 2021). SGBs are also allowed to co-opt individuals who are not SGB associates but have financial administration skills, abilities, and experiences (Richards, 2021). As a result, effective communication must take place between the SGB and the finance committee, as well as between both groups and the school principal.

2.9.3 Support from the Department of Basic Education in the School Finances as Stipulated by the South African School Act

The South African Schools Act, outlines the role of the Department of Basic Education (DBE) in providing public schools with funds allocated for learner education by the provincial legislature, as stated in Section 12(1) of the Act. Therefore, effective financial management should be a significant concern for the DBE, and officials should assist school governing bodies in performing their functions (Mohapi & Netshitangani, 2018). Additionally, Section 19 of the Act requires that the provincial department provide introductory training for newly elected SGBs to enable them to perform their functions. Continual training should also be provided to promote effective governance or the assumption of additional functions (Dlomo et al., 2022). However, the training provided by school districts is often ineffective because the officials selected, or consultants employed to train SGBs are not experts in financial school management (Dlomo et al. 2022).

2.10 Theoretical Framework

According to Ajani (2022), a theoretical framework is a source of foundational structure of a scientific enquiry. This is a systematic and conceptual perspective that guides researchers in the development of their research project. The main aim of a theoretical framework is to help researchers organise their thoughts, develop research questions or hypotheses, define a research problem and determine the suitable methodology and techniques to use (Adom et al., 2018). This study was underpinned by a theory called the participatory democracy theory (PDT). It points out the parent governors' participation in school financial activities (Jefferson, 2015). Several political theorists, including Jean-Jacques Rousseau, John Stuart Mill, and Robert Dahl, established the PDT, which supports the right of citizens to freely participate in the decision-making process (Dahl, 1989). The theory is not unique to one person; it has developed over time and has been used in a variety of situations, including education, to encourage democratic engagement and decision-making among individuals (Ajani, 2022). Further, this theory is influenced by a participative and democratic management style which seeks to actively involve every member of the team in decision-making (Buthelezi & Ajani, 2023; Smit & Oosthuizen, 2010). The PDT talks about freedom of participation for all citizens. Waghid and Davids (2022) define democracy as a governance principle where supreme power of a group is vested on the shoulders of all the group members. In the context of this study the

group was the SGB, whose members are directly and collectively given a voice and vote. Those not present are indirectly, through a representative system, given ownership of inputs and outputs of the group processes (Kruger et al., 2024). PDT can also be simply referred to as participative management or democratic management (Smit & Oosthuizen, 2011) and advocates freedom of participation by citizens. Democracy as a principle of governance is based on protecting human rights, allows for freedom and emphasises tolerance of diversity and mutual respect.

The theory has evolved from the political circles over time and has been applied in diverse contexts, including organisational leadership, healthcare and education, to promote democratic participation and decision-making among citizens and no longer belongs to one particular field (Buthelezi & Ajani, 2023; Smit & Oosthuizen, 2010). In South Africa, Zulu (2013) used the principles of PDT under her democratic schooling theory and social justice theory in a study carried out in KwaZulu-Natal to investigate roles played by SGBs in addressing democracy and social justice issues in schools. The study incorporated two primary schools in the Ugu District in KwaZulu-Natal. Tsvara's (2014) qualitative study focusing on 24 schools in the Vhembe District, Limpopo province was also underpinned by participative democratic theory.

In support of PDT, Buthelezi and Ajani's (2023) study, which collected data from 25 school principals in King Cetshwayo district in KwaZulu-Natal, concluded that the South African school system needs participatory management to transform effectively. They concluded that in the absence of participatory management, schools face challenges that disrupt learning and teaching. They recommended that principals should promote democratic principles which bring other stakeholders on board for active school management. Finally, Tsvara's (2014) Limpopo Province study revealed that the increasing emphasis on participative management practices mirror the widespread view that democratic and consultative approaches to school leadership increase the job satisfaction of teachers.

The dawn of 1994 South African democracy came with educational governance transformation, the SASA, which democratised school management, leadership and governance. The Act's introduction promoted good school governance through the institution of democratically elected SGBs, the members being drawn from principals, educators, parents and learners (Motimele, 2021). At the centre of SGB governance structures is the infusion of

2015). Further, it recognises that individuals and communities possess valuable knowledge, experiences, and perspectives that should be acknowledged and incorporated into decision-making processes.

Literature further states that this theory highlights a participative form of democracy by redistributing power to local SGBs, with the removal of centralised control over certain aspects of educational decision-making and the establishment of cooperative governance between education authorities and the school community (Smith, 2015). To further support this, the use of this theory in other studies was intended to establish a democratic power sharing and cooperative partnership among the state, parents, and educators (Karlsson, 2002). The significance of establishing a shared collaboration among the government, parents, and education was emphasised in Karlsson's (2002) study. Furthermore, Smith (2015) notes that parents in this study frequently misunderstood the role of the SGB for a political platform and associated participatory democracy with political power. This theory argued that inclusivity in school committees encourage commitment of all its stakeholders, especially in an organisation such as the school (Smith & Oosthuizen, 2011). This theory aims to encourage the people to assume their duties and responsibilities as citizens of a democratic state. The parental governors serving as members of the finance committee are treated as solid partners in the education system.

Even though this theory was mainly used to promote democracy in decision-making with its citizens, it has also been criticised by some scholars. Karlsson (2002) criticises the gap that exists between the perceived role of principals in SGB meetings and decision-making procedures and the expected role of parents as the majority decision-makers in school governance.

Nevertheless, this theory fits well within the research objectives of this present study, mainly the extent to which parent governors are involved in decision-making in primary schools in KwaZulu-Natal. This is supported by the SASA, which also highlights that the members of the governing bodies are voluntarily selected to represent parents, educators, learners, and personnel of the school and are part of the decision-making towards the running of the school.

2.10.1 Moving Towards a Democratic Governance

Education governance emphasises that the SGB must be able to work together as stipulated by the policies, to promote a more democratic country, as highlighted in the South African

Constitution of 1996 when decisions are made (Dlomo et al., 2022). The RSA's constitution became democratic in 1996, implying that the SGB must conduct itself democratically (Potgieter et al., 1997). In underprivileged schools, the current education system differs from the previous one in that now community interaction is promoted, whereas prior to 1996, community engagement was discouraged and less democratic. The main features of a democratic decision, such as collaboration, consultation, participation, and partnerships, were overlooked by the old educational system (Campher, 2020). However, the situation in privileged schools was different from the situation in underprivileged schools, where often democratic principles have not been practised in accordance with the 1996 SASA and the South African Constitution (Getahum, 2018).

When it came to the underprivileged schools, the SASA, and the way it should have been implemented was not done successfully (Luggya, 2019). This serves as the main interest in the study, which aimed at investigating the experiences of parent governors serving in primary schools within finance committees.

2.11 Chapter Summary

This chapter provided a context for this research by connecting it to previous studies. This study focused on the experiences of parent governors who served as financial managers in selected primary schools. In this chapter, several issues were addressed. These included examining the roles and formation of SGBs in public primary schools, exploring the parent governors' understanding of their role in financial decision-making, exploring the extent of their involvement in decision-making, understanding the challenges they face in their participation, examining the strategies they use to address those challenges, and identifying the kind of support parent governors needed to participate in financial decision-making in the primary schools. Overall, this chapter provided a comprehensive overview of existing research, established the importance of the current study, and addressed various aspects related to rural parent governors' experiences in financial management within the context of primary schools. This chapter also included the theoretical framework which was, Participatory Democratic Theory which argued in favour of the inclusion of all the relevant stakeholders in the decision making of the school, further emphasising the importance of assuming duties in a democratic manner.

CHAPTER 3

RESEARCH METHODOLOGY

3.1 Introduction

In the previous chapter, I discussed the international and national literature related to this study. The purpose of the study was to investigate how parent governors experience the management of school finances within the context of primary schools at the Umbumbulu District. In this chapter, I will discuss the procedures undertaken in carrying out this research. It commences with outlining the objectives of the study, followed by the research paradigm, research approach, and research design to get deep insights into the phenomenon being studied. I have also highlighted the population, sampling methods, data collection, and procedures to get in-depth and authentic data for this study and data analysis for a better understanding of the phenomenon. Furthermore, trustworthiness, ethical considerations, as well as limitations of the study will be discussed. Finally, the chapter ends with a summary.

The objectives of the study were:

- To explore the parent governors' understanding of their role in the management of school finances.
- To understand the challenges parent governors face in managing school finances.
- To understand strategies that parent governors use to address the challenges they face in managing school finances.
- To identify the kind of support that parent governors need to manage school finances.

3.2 Research Paradigm

The interpretive paradigm was used in this study to gather specific responses from participants to confirm their viewpoint as appropriate for the purpose of this study. A research paradigm refers to the theoretical structure around which a study is built and also provides a framework of assumptions and knowledge on which research projects' theories and procedures are based Creswell (2013). This research study utilised an interpretivist paradigm that encompasses a researcher's understanding of the nature of reality and their viewpoint on the kinds of knowledge that may be produced and the criteria by which such information must be validated. Creswell (2013) further states that a paradigm is a collection of fundamental ideas that define a person's worldview, including the nature of the universe, their role in it, and the spectrum of

potential interactions with its elements. Scotland (2012) and Dieronitou (2014) postulate that a research paradigm consists of ontology, epistemology, and research methodology. Ontology answers the question of whether there are numerous realities. Epistemology is the study of knowledge, while research methodology specifies how the study is to be carried out and validates findings. When conducting research, three primary paradigms are applied. These are critical analyst, positivism, and interpretivism (Du Plooy-Cilliers et al., 2021). In this study, I opted for the interpretive paradigm as this would give an opportunity to generate valid data from the parent governors serving within the finance committee.

3.2.1 Interpretivism

According to Du Plooy-Cilliers et al. (2021), an interpretivist paradigm is concerned with understanding phenomena through two lenses: to strive to understand and to interpret the world in terms of its actors. The key feature of this paradigm is the interpretation of the subjective world of human experience, which in this case was the parental governors' experiences in primary schools in the Umbumbulu district.

Pham, (2018) assert that the interpretive paradigm is about understanding the everyday lived experiences of people in the specific area or a historical setting. Cohen et al. (2000) argue that the interpretivist paradigm is characterised by a concern for the individual. Ponelis (2015) notes that the interpretive paradigm has some limitations. The first limitation is that it does not aim to employ scientific measurement techniques, nor does it intend to generalise the findings of the selected case to other contexts (Flick, 2015). Therefore, to overcome these limitations, I used various methods to generate data, by making sure that the selected tools (semi-structured interviews) were used with each participant, open-ended questions relevant to the study were asked, observation of body language, note taking and probing were utilised to get rich information.

3.3 Research Approach

A research approach refers to the overall strategy or methodological framework that guides the design and execution of a research study (Du Plooy-Cilliers et al., 2021). It assists the researcher in selecting a method that aids in approaching research issues and study objectives. Creswell and Creswell (2018) define a research approach as a research plan and procedures that detail the steps from broad assumptions to detailed methods of data collection, analysis, and interpretation. A study approach helps as a foundation for making judgments on the types

of data to collect, data analysis strategies, and interpretation of findings. In this study I used the qualitative research approach.

3.3.1 Qualitative Research Approach

This study was located within the broad area of a qualitative research approach. It explored the experiences of parent governors of SGBs that serve within the finance committees in three schools. It aimed to investigate the experiences of these parent governors and how they interpret their daily lives working in leadership positions from their own perspectives. This qualitative approach allowed me to concentrate on understanding each participant's or parent governor's experiences rather than generalising cases. Therefore, during this study, I emphasised the importance of the subjective experience of each participant, making sure that equal opportunities were given to each during interviews and sufficient time was provided during these interviews.

The main focus of qualitative research, according to Kumar (2014), is to understand, explain, explore, discover, and clarify situations, feelings, perceptions, attitudes, values, beliefs, and experiences of a group of people. It is concerned with the individual's perspective (Howitt, 2010). For this study, I was concerned with exploring the experiences of parent governors in finance committee positions in three rural schools. Qualitative research allows the researcher to explore people's perceptions and experiences, as these may be difficult to measure (Marshall & Rossman, 2011). Qualitative research is usually used when the object of the study is some form of social process, meaning, or experience that needs to be understood and explained in a rounded way (Cohen et al., 2017).

As qualitative research is empirical research where data are not in the form of numbers but words (Punch, 2004), in this study I used qualitative design to comprehend the phenomena by using a prolonged first-hand presence of feelings and opinions of parent governors regarding dilemmas they face in running school governing bodies in rural areas. Using a qualitative research approach for this study allowed participants' unique viewpoints to be acknowledged as they gave meaning to their experiences of working in finance committees within the SGBs (Yin, 2009). Using this approach, I conducted interviews with participants without having any prejudices about their thoughts or behaviours (McMillan & Schumacher, 2010). Furthermore, the research design employed was also determined by the paradigm in which this study was conducted (Creswell, 2009).

3.4 Research Design

The research design is the overarching method a researcher adopts to combine the many components of the study in a coherent and logical manner, ensuring that you effectively investigate the research topic (Busetto et al. 2020). It serves as the blueprint for data gathering, measurement, and analysis.

3.4.1 Case Study

A case study is a type of research design used in various domains, in which the researcher conducts a systematic in-depth investigation of a case, which could be a programme, event, activity, process, a person or a group of individuals (Kumar, 2014; Yin, 2017). Cases are defined by time and activity, and researchers collect detailed information throughout time using a variety of data collection approaches. A case study is an effective study method for getting in-depth knowledge and understanding about unique opinions, occurrences or phenomena and entails investigating subjects within their natural environment, allowing scholars to comprehend the intricacies and dynamics at work (Stake, 1995; Yin, 2014, 2018). A case study is recognised as a study approach used by interpretivist scholars to investigate an in-depth investigation of a specific case (Du Plooy-Cilliers et al. 2021).

The case investigated in this study was the experiences of the parents taking the role of financial managers within SGBs. This decision to use the case study design was based on my interest in the subjective meaning and social world of parent governors serving on finance committees in primary schools, who were able to provide detailed information about their experiences with this portfolio. In this study, the finance committees of primary schools in the Umbumbulu District, where parent governors engage with stakeholders and make financial decisions within the opportunities and limitations of their surroundings, was an ideal setting for this study. This study's focus was on three parent governors from three different SGBs, and my aim was to fully capture the details and complexities of their experiences, highlighting the specific challenges they face as well as the effective financial management strategies they use. Researchers can examine how various cultural, social, and organisational factors influence the phenomenon that they are studying by using case studies, which highlight the significance of context in influencing behaviour and outcomes (Cohen et Al., 2017). Case studies can also help provide knowledge and ideas by identifying similar themes, trends, and best practices inside and across examples through comparative analysis and pattern

recognition (Du Plooy-Cilliers et al. 2021). I may discover repetitive strategies and successful approaches to managing funds in primary schools by exploring the experiences of parent governors in several cases for the purpose of this research. These findings would assist me to make recommendations for better financial management practices in primary schools.

3.5 Population

A population is made up of a collection of people in an area who share similar characteristics (Bertram & Christiansen, 2014). Furthermore, the population consists of all the events of which the researcher is interested learning more about. The population for this study was made up of three parent governors of the SGBs' financial committees of primary schools within the Umbumbulu district. This population was chosen because the objective of the study was to explore the experiences of parent governors in KwaZulu-Natal's Umbumbulu District and how they see their school's financial management.

3.6 Sampling Method and Procedures

Kumar (2014) defines sampling as the process of making informed decisions about which individuals, places, events, or behaviours to be included in a research study. According to Cohen et al. (2017), the act, method, or technique of selecting a suitable sample, or a representative section of a population for the goal of ascertaining parameters or characteristics of the entire population is known as sampling. It is a method of picking individual members or a subset of the population to draw conclusions and estimate the characteristics of the entire population (Yin, 2011). There are two types of sampling used by researchers: probability sampling and non-probability sampling (Creswell, 2012). In order to select the participants for this study, a non-probability sampling method was utilised.

3.6.1 non-probability sampling

Non-probability sampling involves the researcher selecting participants at random rather than using a set or predetermined procedure (Creswell, 2012; Yin, 2011). Thus, it is challenging to ensure that every member of the population has an equal chance of being included in the sample. Using the researcher's sample selection skills rather than a predetermined selection procedure, feedback is gathered using this method. The optimum situations for non-probability sampling are those involving the formulation of a hypothesis, conducting exploratory research, and time and financial restrictions (Creswell, 2014). The non-probability sampling method

that was used in this study adopted the category of a purposive sampling in order to select the participants for this study.

3.6.2 Purposive Sampling

Purposive sampling refers to the deliberate selection of participants who have certain traits, abilities, expertise or experiences and can offer rich and varied data relevant to the research issue (Cohen et al., 2017, Creswell, 2012, 2014; Yin, 2011). At the discretion of the researcher, purposeful samples are created (Creswell & Poth, 2016). Researchers only take the study's objective and the target audience's comprehension into account (Creswell & Poth, 2016). Choosing participants who are most pertinent to the research issue by purposeful sampling can increase the quality and accuracy of the data that is gathered within this study (Kumar, 2014).

This study included three parent governors who were purposively selected from three primary schools situated in an area of the Umbumbulu District as the sample. To obtain insight into the experiences that parent governors in primary schools' face on an individual basis, I deliberately chose to work with three parent governors from SGBs. This was mainly because within this study a small sample size can provide insightful information about particular contexts or occurrences of the parent governors' experiences. This is particularly relevant when conducting qualitative research, when depth of understanding a phenomenon is emphasised (Bertram & Christiansen, 2014). The parent governors working in the finance committees of primary schools in the Umbumbulu district were the main participants in this case study. These participants were specifically chosen according to the study's main research question: What are the experiences of parent governors in the management of school finances in selected primary schools?

3.7 Data generation Methods

The process of obtaining and examining precise data from multiple sources to address research questions, identify patterns, and assess possibilities is known as data collection (Yin, 2008). According to Yin (2008), the process of acquiring data for qualitative research involves a range of techniques, including observation, interviews, photography, texting, document analysis, and artefact collection. In this study, I collected data through interviews.

3.7.1 Interviews

Interviews are a method of data collection that involves two or more people exchanging information through a series of questions and answers (Kumar, 2014). A researcher creates a set of questions to get information from interview subjects on a certain topic or range of topics; this is an effective method for obtaining comprehensive data (Creswell, 2012). Interviews are especially helpful in cases where the subject is complicated, requiring in-depth explanation, or calls for a conversation between two individuals to be completely investigated (Creswell, 2014). Differentiating between different types of interviews is based on their structure. There are three different types of interviews: unstructured, semi-structured, and structured (Bertram & Christiansen, 2014).

3.7.2 Semi-Structured Interviews

This study used semi-structured interviews to collect data from its participants. Semi-structured interviews were used in this study's data collection to have face-to-face conversations with the participants (Maree, 2012). This research study used a primary data gathering technique, such as individual semi-structured interviews, to reach its main goal of better understanding various scenarios involving the experiences of parent governors within finance committees. Semi-structured interviews combine structured and unstructured interviews (Kumar, 2014). By combining both structured and unstructured a qualitative research technique is used to get extensive and in-depth data from participants. By integrating aspects of both, they create a combination between organised and unstructured interviews. While the interviewer has a plan of what questions they want to ask, the questions do not have to be phrased or ordered in any way. Semi-structured interviews are frequently open-ended, allowing for freedom, yet adhering to a predetermined theme framework, providing structure (Maree, 2012).

In this study, I gathered information through a series of questions and, since semi-structured interviews were used, there was also freedom for participants to freely express themselves and share their perspectives. However, interview schedules were created for this project, and individual interviews were conducted with a parent governor in the finance committee of the SGB in each of the three schools. The interviews took place in a venue where the participants felt at ease, and the conversations took place face to face, which allowed me to get closer to the participants and create a good relationship with them. Face-to-face interviews can be

carried out in a variety of situations: in the home, at work, outdoors, on the move and can be used to question members of the general public, experts or leaders, and specific segments of society (Williman, 2011). Cohen et al. (2017) indicate that the use of a semi-structured schedule leaves room for building a relationship between the researcher and the participants.

The times for the semi-structured interviews were regularly confirmed to guarantee that there was enough time for each interview. Each parent governor interview typically lasted about 60 minutes. At the start of every interview, I guaranteed participants that their identities would remain anonymous and that any information they gave would be treated as confidential. I audio-recorded every interview, with consent from the participants, to later transcribe and analyse the data.

3.8 Data Analysis

The thematic method was used for this study because it is a simpler method to analyse data, particularly for qualitative research that makes use of themes that arise (Creswell, 2012). In the qualitative approach of data analysis, thematic analysis explores the data for recurrent ideas in the data, which is then classified as themes (Bazeley, 2013; Bazeley, 2020). Braun and Clarke (2006) describe the thematic coding analysis approach as a method for finding, interpreting and reporting themes that emerged from the data. They developed six phases to analyse data, which this study utilised. These phases are, familiarising of the data, generalising initial codes, searching for themes, reviewing themes, defining and naming themes and producing the report. Before the analysis of data, I transcribed the audio recorded interviews into written text (Hammersley, 2018). After transcribing the interviews, I immersed myself in the data to an extent that I was familiar with the depth and breadth of its content. Immersion involves the repeated reading of data and reading data while searching for meanings and patterns (Braun & Clarke, 2006). I repeatedly read through all the data before coding in order to allow ideas to be shaped and in identifying possible patterns. After I had read, re-read and familiarised herself with transcribed data, I started generating initial codes.

According to Braun & Clarke (2006), coding refers to organising data into meaningful groups. I broke data down in terms of the interview questions in order to enable the coding. Moving to the third step, I started searching for, and refocusing the analysis of, themes. According to Braun and Clarke (2006), themes are broader than codes. I then sorted the different codes into potential themes and collated all relevant codes within identified themes. As Braun and Clarke

(2006) suggest, I created a visual representation in the form of a table to help me sort the different codes into themes. I then began to refine the themes by reading all the assembled concepts in order to ensure that they formed an understandable pattern. The next step was to define and name themes.

Defining and naming of themes refer to identifying what each theme means and determining the features of the data that each theme captures (Braun & Clarke, 2006). I went back to assembled data extracts for each theme and organised them into a clear and consistent interpretation accompanied by quotations. The last and final step that I followed was to produce a report that will be dealt with in more detail in the next chapter. According to Braun and Clarke (2006), this phase involves the final analysis and the write-up of a thematic analysis in order to tell the complicated story of the data in such a way that it convinces the reader regarding the authenticity of the analysis.

3.9 Trustworthiness of the Study

According to Schumacher and McMillan (2010), the degree of mutual meaning that participants and the researcher have for the interpretation and concepts is what determines their trustworthiness. The genuine merit of a research study is its reliability (Holloway & Wheeler, 2015). According to Williams and Marrow (2009), there are three major categories of trustworthiness that all qualitative researchers need to pay attention to: data integrity, striking a balance between subjectivity and reflexivity, and clearly communicating findings. Thus, in order to ensure the trustworthiness of this research study, Lincoln and Guba's (1985) constructs were employed in the same manner within this study as described by Shenton (2004) and Bertram and Christiansen (2014). The following issues of trustworthiness: credibility, transferability, dependability and confirmability will now be discussed.

3.9.1 Credibility

Credibility addresses the internal validity, with the assurance that the study measures what it is supposed to measure (Shenton, 2004). For credibility checks, the audio recordings, transcriptions of the interviews, as well as the direct quotations of participants were provided for cross-examination, for necessary correction and remarks. Polit and Beck (2012) indicate that credibility is mostly measured when the research findings reflect the opinions of the people in the study. It deals with the focus of the research and refers to the confidence in how

well the data addresses the intended focus. Bogdan and DeVault (2015) explain that the credibility of one's research determines the usefulness of the data obtained. In this study I used all of the data generated through semi-structured interviews, as well as strategies used during interviews such as note taking, observations or reading of body language to analyse the data and enhance the credibility of this study. I also selected three participants who had experience of being parent governors serving in the finance committee of SGBs from three primary schools to ensure the credibility of the study. They were given the opportunity to refuse to participate in the study to be sure that the data collection sessions involved only those who were voluntarily willing to take part and prepared to offer data freely. The participants were also asked to be honest and feel comfortable before each interview session. After all interviews were recorded and data were transcribed for data analysis, the transcripts of the data were taken back to the three participants to check for accuracy and see if anything was added to their responses or any information was omitted.

3.9.2 Transferability

Transferability is another aspect of trustworthiness that concerns the degree to which findings from research apply to different people and circumstances (Shenton, 2004). Transferability involves identifying whether the findings from a study can be applied to other contexts, people or situations beyond the original study setting (Lincoln et al. 2017). When the study focuses on a specific group of people and or situations, such as a small number of parent governors, the specific context of the primary schools and the nature of the finance committees could also assist the readers to understand whether the findings might be relevant in other similar settings. To ensure transferability in this study, rich detailed data of the study was documented, allowing others to allowing an opportunity for this study to be applicable to different settings. Transferability was also enhanced through detailing the characteristics of the parent governors, the specific context of the primary schools, and the nature of the finance committees, relevant details such as the size of the population, the sampling process, with an inclusion of data generation methods and instruments were included to promote transferability in this study

3.8.3 Dependability

Dependability is the assurance that the same results would be produced if the same study were conducted again with the same participants, procedures, and circumstances (Shenton, 2004). The consistency of the data generating tool in producing the same results when the research

is repeated is the main focus of dependability (Creswell et al., 2016; Gall et al., 2007). Dependability, according to Yin (2011), aims to reduce bias and inaccuracy in a study. To enhance dependability in this study, the use of semi-structured interviews as data generation methods was maintained, this was well achieved through the use of audio recording with the aim of capturing all the issues independently. Furthermore, the use of semi-structured interviews was a successful practice as it allowed for consistent data collection while still providing flexibility to explore emerging topics during the conversations I had with the participants. The use of audio recordings helped me to ensure that all participants' responses are captured accurately and can later be reviewed to check for consistency.

3.9.4 Confirmability

Confirmability is concerned with establishing that the researcher's interpretations and findings are clearly derived from the data, requiring the researcher to demonstrate how conclusions and interpretations have been reached (Kumar, 2014). It is the process of showing that the data and conclusions drawn from them are real and not the product of the researcher's imagination (Bloomberg & Volpe, 2008). It is also the extent to which other researchers can verify a study's findings (Du Plooy-Cilliers et al., 2021; Stahl & King, 2020). Providing an audit trail that explains every stage of the data analysis and demonstrates that the findings are impartially represented by precisely capturing the viewpoints of the participants is a common way to verify confirmability (Korstjens & Moser, 2018). Within this study, I utilised triangulation and member checking to ensure trustworthiness.

Triangulation is a technique used by researchers to enhance the credibility of the findings through integrating different perspectives or approaches to ensure that the study measures what it is intended to measure (Yeasmin & Rahman, 2012). Henry (2015) states that in order to deepen their understanding and provide a convincing an argument for their study, researchers triangulate their data by gathering information on the same phenomenon from several sources. According to Yeasmin and Rahman (2012), the researcher's choice of triangulation method is determined by the study's objectives. This study looked closely into the experiences of parent governors in primary schools who were serving within the finance committees and their experiences within this portfolio. Thus, they were the only ones who could give me the information I required. In order to create themes based on different participant thoughts and enhance the study's credibility, data source triangulation seemed to be the most appropriate type of strategy (Creswell, 2014). Therefore, I interviewed three parent

governors from three different primary schools to combine their different viewpoints and experiences concerning the portfolios they occupy within the finance committee.

To assure accuracy, researchers summarise the data they have collected from participants and follow up with questions through one-on-one interviews. This procedure is known as member checking (Creswell, 2007). As an alternative, the researcher might offer the participants the final report so they can check the interpretation (Creswell, 2007, 2009; Henry, 2015). Following each interview, I summarised the transcripts and had follow-up interviews with each participant to get their feedback on the findings' summaries (Creswell, 2014).

3.10 Ethical Considerations

The rights of participants and the responsibilities of the researcher are both covered by ethical considerations and research ethics are crucial to consider, particularly when humans are involved (Bertram & Christiansen, 2014). According to Schumacher and McMillan (2010), human beings are the focus of educational research. As a result, it is the researcher's ethical responsibility to prioritise the well-being and rights of the research participants in the study (Parameshwara, 2019). Within this case study, I identified ethical concerns by getting the necessary permission to carry out this research. Authorisation from the University of KwaZulu-Natal research office was granted. Then, the DoE in KwaZulu-Natal granted me written permission to conduct research at the three chosen schools. A formal letter of authorisation was signed by the school principals, giving me permission to interview the participants who were members of these schools' SGBs. I then had a meeting with each participant to go over the objectives of the research and gave them a consent form to sign. According to Ryen (Parameshwara, 2019), informed consent requires that participants be made aware of both the nature of the study and that they are being studied. Each participant signed the consent form after being informed of their right to withdraw at any point during the study. This is in accordance with Cohen et al. (2017), who believe that a research participant has the right to decline participation or to withdraw once the study has commenced.

In addition, Cohen et al. (2017), outlined several guidelines that individuals must abide by, such as the right to confidentiality, privacy, and anonymity, as well as the obligation to not harm participants. According to Cohen et al. (2017), keeping confidentiality means protecting the participants' identities as well as the study location. Confidentiality and anonymity were guaranteed, and they were maintained during the study when pseudonyms were employed to

protect the participants' and the schools' identities. Participants' security and safety were carefully considered. During the interviews, participants were asked to consent to an audio recorder or phone recorder being used. Finally, I set up meetings with the parent governors at their locations and gave them an explanation of the reasoning behind this study. Additionally, they were given the chance to talk about relevant research-related issues, their participation in the study, and any questions they wanted to ask. Together we planned when and where to meet for the interviews.

3.11 Limitations of the Study

This was a qualitative study that was conducted in three selected primary schools with three selected participants, two of whom were chairpersons of the finance committee and one of whom was the treasurer of the finance committee. In discussing the limitations of the study it is important to note that, a study may encounter certain challenges during the process of completing their paper, but this is beyond the control of the researcher (Bertram & Christiansen, 2014). This was a small-scale, qualitative study that aimed to get detailed insights from a small number of participants. Rather than generalising findings, a qualitative researcher strives to provide a detailed, contextualised understanding of human experiences (Cohen, et al.,2017). Therefore, the findings are unique to the participants and in their natural setting; they cannot be replicated or generalised to all situations that are similar. Lastly due to a lack of triangulation that involves different use of strategies to increase trustworthiness of the study, this study only relied on the use of semi-structured interviews were used to gather data. However, to ensure that trustworthiness was practised in this study detailed and rich data was provided, this helped the reader to apply the findings in a similar setting and ensure a deeper understanding of the study's setting. By employing these strategies, I was able to enhance the trustworthiness of the study, making the findings more credible and useful even within the constraints of a small-scale, qualitative research design.

3.12 Chapter Summary

In this chapter, the procedures undertaken in carrying out this research were discussed. First, the objectives of the study were outlined, followed by the research paradigm, research approach, and research design to get deep insights into the phenomenon being studied. The population, sampling methods, data collection, and procedures to get in-depth and authentic

data for this study and data analysis for a better understanding of the phenomenon were carefully considered. Furthermore, trustworthiness and ethical considerations were discussed. In the next chapter, an analysis of the data will be provided.

CHAPTER 4

PRESENTATION AND ANALYSIS OF DATA

4.1 Introduction

The previous chapter discussed the research design and methodology. This chapter highlights and carefully interprets data using a technique known as thematic analysis. Data were gathered through semi-structured interviews. The themes that emerged were further grouped and categorised into sub-themes to gain greater understanding of the issue covered in this study, a technique known as thematic analysis. Furthermore, Chapter 4 presents the data analysis and responses organised under the primary research questions stated in Chapter 1 in order to contextualise the data gathered. It also attempts to ascertain whether participants can make sense of their own experiences as parent governors of rural primary school governing bodies, serving within the finance committees.

This qualitative case study was conducted within the interpretive paradigm. It was conducted in three primary schools in KwaZulu-Natal. As required by ethical reporting process of human research data, the real names of every research participant were purposely hidden. To ensure anonymity, pseudonyms were used to protect the identities of participants. The participants and the school profiling are presented in full in this chapter. This study was guided by the following research objectives:

- To explore the parent governors' understanding of their role in the management of school finances.
- To understand challenges parent governors face in managing school finances.
- To understand strategies parent governors, use to address the challenges they face in managing school finances.
- To identify the kind of support that parent governors need to manage school finances.

One-on-one semi-structured interviews were employed to gather data from three participants in three selected primary schools of the Umbumbulu circuit in KwaZulu-Natal. All participants were members of the financial committees in their schools. The main question that was used to frame the study was: What are the parent governors' experiences of financial management in selected primary schools in the Umbumbulu district of Kwazulu-Natal province?

The research sub-questions were:

- How do parent governors understand their role in the financial management of school finances?
- What challenges do parent governors face in managing school finances?
- What are the strategies that parent governors use to address the challenges they face in managing school finances?
- What kind of support do parent governors need to manage school finances?

4.2 Profiling of Schools and Participants

This study was made up of three participants who were part of the finance committee. Their experiences within this portfolio ranged from 1 to 15 years. Two of the participants were females and one was male. To maintain the study's anonymity, pseudonyms for both the school and participants were used. The names and locations of the schools were kept confidential by using School A, School B, and School C instead of their real names. Additionally, the participants' identities were kept anonymous by using the pseudonyms Mrs Rose, Mrs Lilly, and Mr Petals.

4.2.1 School A

The first school is referred to as School A. It is a public school and depends on government funding. It is classified as a Quintile 1 school which implies that many parents cannot afford their children's education because some of them depend on social grants due to a lack of financial resources (Dibet, 2015). In this school, there is a security guard that works at the gate to monitor the movement of people into and from the school. The school's infrastructure is showing signs of wear, with windows that are cracked and hanging from their frames. However, the school is neat—there are no papers on the ground, and the garden and grass are well maintained. The road leading to School A initially starts as a pothole-filled tar road, but halfway there it transitions into a gravel path that leads to the school gate. To support the nutritional needs of learners, School A operates a feeding scheme. Class monitors are usually instructed to collect the food from the kitchen and assist in distributing it to learners in their respective classrooms just before breaktime. The principal's office at the school is quite busy, filled with various items such as files, school awards, and chairs for guests and staff members.

To enter the principal's office, visitors are required to go through the secretary's office first. This protocol ensures that there is a systematic process in place where visitors interact with the secretary before meeting with the principal.

4.2.2 Profiling of Mrs Rose in School A

The chairperson of School A is Mrs Rose, a pseudonym used for maintaining anonymity. She is a full-time car rental agent at the airport and is between the ages of 50 and 55. She was born and raised within this area and still lives close to the school, which makes her an SGB member who has deep-rooted connections with the community. Mrs Rose is the treasurer of the school finance committee and has served on the SGB for 15 years. She is currently preparing for her early retirement and is looking forward to relaxing at home and continuing to serve on the SGB. However, she indicated that it was her last term of serving in the SGB. Having lived life to the fullest, she indicated that she desired to dedicate her time to being a full-time grandmother and enjoying her pension. She also has a grandchild in Grade 6 at the school. Mrs Rose indicated that she used her full-time job's financial knowledge to become an essential parent component of the finance committee. She manages the school's financial matters and works with the principal. The school has eight members in the SGB three women and five men. Mrs Rose indicated that she was happy to bear the title of female chairperson.

4.2.3 Profiling of School B

The second school is referred to as School B. Similar to other rural public schools in the area, it receives funds from the government. Most parents are unemployed and rely on social grants and, as a result, the school is a no fee school. As a Quintile 1 school, School B receives funding from the DoE for supplies such as stationery and textbooks for its learners. The school is situated in an isolated position at the top of a mountain; however, getting there is easy. There is a long gravel road leading to the school gate. There is a security guard who welcomes visitors at the school gate, asks them to sign the visitors' book, and directs them to the relevant offices. Based on the limited space in the school, there is a shortage of parking space for visitors. Thus, there is a need for adequate parking infrastructure to address the parking needs of school visitors.

The school itself is clean and well-maintained. The school and the surrounding area both face serious water problems. The school receives assistance from the municipality in dealing with this. JoJo tanks are used to store the water that is brought in by water trucks. Students and the

staff are frequently dropped off far from the school, necessitating a lengthy walk to the premises. To meet the nutritional requirements of learners, School B runs a feeding programme; the kitchen staff serves meals to learners in their classrooms. The school is managed by only one principal who has a large, sophisticated office. In the principal's office, paperwork is well arranged, and school awards give an attractive appearance within this office. Other offices, such as the secretary's office, the staffroom and the photocopying room, are located within this building, away from the classrooms before reaching the principal's office.

4.2.4 Profiling of Mrs Lilly from School B

The pseudonym used for the second participant in this research study was Mrs Lilly is between the age of 45 to 50 years, who occupies the position of chairperson within the finance committee. Furthermore, she is a principal at an Early Childhood Development (ECD) centre located near the school and resides close to the community. Additionally, Mrs Lilly operates a family business providing transportation services to tourists. She has a child enrolled in the same school, which qualifies her to be part of the SGB. Due to her dedication and leadership skills, she has served on the committee for two consecutive terms. Among the seven SGB members, Mrs Lilly is one of three women, and she takes great satisfaction in being a part of this team. She works closely with the principal as he is the accountable officer of the SGB.

4.2.5 Profiling of School C

The third school will be referred to as School C. It is located in a rural middle-class neighbourhood and is a Quintile 2 school. Primarily a Quintile 2 school is a no fee school, which is mostly situated in a rural area and sometimes in a suburban area (Dibet, 2015). Since the road leading to the school is a busy route that connects to the establishment's facilities like the court and Social Development offices, speed humps have been constructed to ensure safety. The Umbumbulu Circuit, where the district managers are situated, is a few blocks away from the school. There is a guarded entry with a security room to welcome the visitors as they enter the school premises. The school is currently undergoing a reconstruction project for the school hall. Furthermore, the shattered windows in the classrooms require extensive repairs. Departmental heads are temporarily making use of classrooms as provisional offices, while the deputy principal and teachers share an office as their workspace.

While the school is situated next to a well-maintained sports ground that belongs to the municipality, the school itself is in rather a poor condition. One principal, one deputy principal, three departmental heads, and 19 post-level 1 teachers make up the school personnel. The majority of the parents are unemployed, making it difficult for them to feed their families. To support these families, although not all of them, School C runs a feeding scheme programme that also extends their hands to the poorest families where groceries are sent to their households.

These families often rely on government social grants for their basic needs.

4.2.6 Profiling of Mr Petals from School C

The third participant in this research study was assigned the pseudonym "Mr Petals". Mr Petals works as a paramedic for a municipality and holds the position of treasurer for School C's finance committee. For the past two years, Mr Petals has served on the SGB committee within the finance committee and pointed out that he thoroughly enjoys the responsibility. Although juggling his paramedic work with his involvement in the SGB was initially difficult, he indicated that he has successfully accepted and understood his position. Mr Petals, who is between the ages of 45 and 50, fully qualifies to be part of the SGB, because he has two children attending School C. He works closely with the principal, who is a male, in his capacity as treasurer, as they both serve as signatories of the finance committee. Additionally, Mr Petals holds a diploma in Emergency Medical Care, bringing valuable expertise to the committee.

4.3 Research Questions, Themes, and Sub-themes

Table 1

Research Questions, Themes and Sub-Themes

Research Questions	Themes and Sub-Themes
<p>1. How do parent governors understand their role in the financial management of school finances?</p>	<p>Theme 1: Parent Govenors’ understanding of their roles in school financial management :</p> <p>Sub Theme 1:</p> <p>The role and responsibilities of the finance committee</p> <ul style="list-style-type: none"> ➤ The chairperson’s role in the finance committee ➤ The treasurer’s role in the finance committee <p>Sub Theme 2: The election process of the finance committee</p> <p>Sub Theme 3: Being the voice of the parents</p> <p>Sub Theme 4: Understanding the school finance legislation</p>
<p>2. What challenges do parent governors face in managing school finances?</p>	<p>Theme 2: The challenges that the parent governors face in managing the school finances in primary schools</p> <ul style="list-style-type: none"> • Inadequate training provided to the finance committees • Dynamics of school finances • Lack of resources for teaching and learning due to the delay receiving the funds for the schools
	<ul style="list-style-type: none"> • Financial challenges in schools within the low-income communities • Disengagement between the SMT and the SGB. Power dynamics and communication challenges within the SGB • Lack of parental involvement

<p>3. What are the strategies that parent governors use to address the challenges they face in managing school finances?</p>	<p>Theme 3: The strategies parent governors use to address the challenges they face in financial decision-making in primary schools</p> <ul style="list-style-type: none"> • Innovative solutions to financial constraints • The power of collaboration • Importance of transparency in organisational dynamics • Sharing common goals and a clear vision • Delegation of tasks
<p>4. What kind of support do parent governors need to manage school finances?</p>	<p>Theme 4: Support needs of parent governors</p> <ul style="list-style-type: none"> • School-based support • Support from the DBE

4.4 Discussion of Themes

The analysis of these interviews identified four main themes that were directly related to the research questions, and each theme consisted of sub-themes that emerged during the interviews with the participants. The findings helped to shed light on the participants' experiences as parent governors serving within the school's finance committee, providing a deeper understanding of the study's objectives. The first theme arose from the participants' responses that were based on the first research question: What are the parent governors' understanding of their role in the management of school primary?

4.4.1 Theme 1: Parent Govenors' understanding of their roles in school financial management

This research theme focused on examining the duties and responsibilities of finance committees within the SGB. When the participants were asked about their understanding of their role within the SGB, various responses emerged and were categorised into four subthemes.

4.4.1.1 Sub-theme 1: The role and responsibilities of the finance committee

In this sub-theme, I wanted to assess participants' understanding of their roles and responsibilities within this portfolio. The participants showed an understanding of their roles within their portfolios, and they were able to explain their duties and responsibilities.

- **The chairperson's role in a finance committee**

Mrs Rose commented:

As the chairperson, one of my primary responsibilities is to ensure the efficient operation of the entire committee, including involvement in day-to-day activities. The most satisfying aspect of this position is that, despite my lack of formal education, my interest in financial matters has allowed me to be a valuable team member for many years.

- **The treasurer's role in the finance committee**

In this theme the participants indicated that they were appointed to be treasurers within the finance committee. They also showed great understanding of their roles and responsibilities within this portfolio.

Mrs Lilly explained:

In our school as the treasurer, I was re-elected, because I was familiar with the process. I perform the functions that deal with the funds available and requested for the school.

Mr Petals noted:

I am currently serving as the school's treasurer. Primarily I am responsible for representing the parents and ensuring that the school operates in line with its expectations such as adhering to the vision and mission of the school. My job also includes monitoring the use of funds and providing parents with regular updates on how the money is being spent.

The participants displayed an in-depth understanding of their various portfolio positions and were able to explain the responsibilities they have within their portfolios. Based on the responses provided, it can be established that the members of the finance committee have an in-depth understanding of their respective tasks and responsibilities. They also displayed determination and commitment to carrying out their responsibilities, despite challenges such as a lack of formal education or being newcomers to their roles. Each of them provided important insights on how the school operates and manages financial matters, showing a significant level of engagement and responsibility in their positions.

Mrs Rose expressed her roles and primary duties as chairperson of the financial committee within the SGB, which includes overseeing the smooth functioning of the entire committee; this includes the day-to-day activities. Due to her significant interest in financial concerns, she finds contentment in contributing as a valuable team member despite her lack of formal schooling. Mr Petals and Mrs Lilly also indicated their appointments to the treasurer positions within the finance committee and indicated a thorough understanding of their roles and responsibilities. Furthermore, Mrs Lilly, a re-elected treasurer, stressed her experience with financial procedures and the tasks required in handling the school's resources. On the other hand, Mr Petals, the school's treasurer, acknowledged his inexperience in the post but expressed his willingness to fully understand it. His primary role is to represent parents and ensure that the school follows its vision and goal. He is also responsible for monitoring fund expenditure and providing regular spending updates to parents.

This finding confirms what Gallie (2021) emphasised, that financial management in education refers to the allocation and use of resources to produce high-quality educational services and support learners' achievement. According to Owen (2016), having a sound financial awareness is a crucial skill that all managers must have. Among the multiple financial management skills necessary is having the capacity to allocate funds and emphasising the schools' objectives.

4.4.1.2 Sub-theme 2: The election process of the finance committee

This study discovered that participants had a clear understanding of the process of electing the finance committee and were well informed about the steps that were followed to select parent members to the finance committee. When participants were asked about the election of the finance committee, they provided similar responses:

Mrs Rose noted:

During the election process of the SGBs, the parents will choose some names, and everyone in the room must be prepared that their names might be selected. The elected parents are then informed that they will now form part of the SGB and thereafter the finance committee within the SGB is elected and it is discussed right at that time who will be the chairperson, secretary, and treasurer. The parents are given the opportunity to agree to be part of the team as this is a voluntary process. Once this process has been finalised then the meeting process is written down for records, as this is required by the department of education.

Mrs Lilly also shared her understanding of the SGB election process and how the finance committee is elected:

During the meeting, the parents participate by calling out names to nominate other parents that they would like to be part of school governing body. This election takes place when the previous members of the school governing body have fulfilled their term, which is usually after a period of three years. Once the new members are nominated, there is an opportunity for the parents to vote for them until the required number of members for the school governing body has been reached. When we look at the finance committee, this is not necessarily done on a different day or a different meeting, but the finance committee is selected by the SGB members with a clear indication of who will be the secretary, chairperson and the treasurer.

Mr Petals also shared his understanding of this process, carefully explaining:

After the SGB has been elected, within the same meeting, another process is held to elect the finance committee, which consists primarily of parents who are democratically selected and are responsible for the school's finances.

From the above verbatim quotations, it is evident that all three schools follow similar procedures. It is also evident that this process is voluntary and democratic, where parents are all given a fair chance to nominate a potential candidate to represent them within the finance committee. It is also clear that the election of the SGB members and the election of the finance committee is a transparent process, where parents are involved and are well informed about the event. This finding is in line with Ali-Nakyea et al. (2019), that the SGB serves as the representation of the community within a specific school and members of the SGB are chosen through a democratic process that ensures that the parents have the necessary support from the community to adhere to their interest and running of the school. It is thus important to note that this form of a committee must be elected based on the interest of serving the community.

4.4.1.3 Sub-theme 3: Being the voice of the parents

In this sub-theme, two participants revealed that they played an important role in representing parents. In the following quotations, participants share that the most important role they play within their positions is being the voice of the parents. They also indicated that this involvement allows them to build strong relationships between parents and the school.

Mrs Lilly noted:

My responsibility is to be the voice of the parents which allows the school governing body to attend to the needs and interests of the entire community. This involvement is good, because it speaks about teamwork and parents will feel valued in the school's decision-making process.

Mrs Rose shared the same sentiments:

I am the voice of the parents and that allows us as the school governing body to hear the concerns and needs of the parents and also build a strong partnership between the parents and the school. This partnership emphasises that the child is the most important client, whose needs have to be fulfilled.

The above responses imply that, within the SGBs, parent governors play an important role in representing the opinions and ideas of parents. Parent governors are responsible for representing parents' interests and concerns in educational decision-making processes as elected members of the SGB. This confirms the findings of Sibanda (2017) that the SGB, serving as the voice of the parents, builds trust and promotes effective communication. Sibanda (2017) also states that being the voice of parents ensures that the decisions that are made by the school aligns with the values and aspirations of the parent community. It is of paramount importance for the SGB to be the voice of the parents as the parents trust the governing body together with the finance committee with the responsibility to make decisions that affect the overall wellbeing and functioning of the school. When the parents are well represented, their suggestions and feedback are considered in the decision-making process. The finance committee mainly focuses on overseeing the financial aspects of an organisation, such as fundraising, budgeting and financial planning. According to Nkanyane and Sehoole's (2020) findings, while the primary responsibility of the SGB is to ensure financial stability within the schools, they also act as a voice for their counterparts, such as parents. Parents usually have concerns regarding the financial matters related to their child's education and this information needs to be brought to the finance committee. It is thus important to have the finance committee to act as a communication channel between the parents and the administrative staff, where they share their concerns and ensure that their voices are heard in the decision-making processes that are related to the finances of the schools.

4.4.1.4 Sub-theme 4. Understanding of school finance legislation

During the interviews, participants were asked about whether they refer to any documents or policies from the DoE when making decisions about school funds and overall decision-making processes. All three participants were aware that there is legislation that governs the use of school finances. Mr Petals and Mrs Lilly indicated that the SGBs had to adhere strictly to the legislation and rules. On the other hand, Mrs Rose indicated that even though the SGBs consulted the legislation to guide them, they do not have the final say in the decisions that are made regarding the school and its finances.

Mr Petals stated:

I will need to look up at my notes to provide an appropriate answer, but what I am certain of is, we are led by the South African Schools Act as we are not allowed to deviate from what is stipulated on it. Mrs Rose answered this question by saying:

The government provides us with rules on how to run the school, but we evaluate them and go through them accordingly. When we follow what guides us on how to run the school, we generally choose what works for us, so long as it is also fair for the community. It is important to keep in mind that the SGB does not have the final decision-making authority, but we must work together with the school. The most important policy we adhere to as the finance committee is that everything we do must be documented, as this evidence is always required by the department of education. All activities in which we engage must be supported by evidence.

Mrs Lilly shared that:

It depends on the needs of the school at the time, and we make decisions based on what the department requires, considering the needs of the school. We mainly rely on SASA to manage the school. Not necessarily within the school governing body, but we are guided in everything we do by the government, and as the school governing body, we ensure that all the stipulated responsibilities are fulfilled. During SGB meetings, we ensure that every decision is made according to how it should be.

From the above responses, it is evident that the schools of the participants under study consulted the SASA to guide them in managing school finances. This is in line with the findings of Dlomo et al. (2022) who state that the SASA functions as a guideline for managing

schools and outlines the responsibilities, roles, and potential issues that may arise within the finance committee and the SGB. Even though all three participants were aware that there are regulations that guide the financial management in schools, one participant did not seem to know the specific legislation used in the decision making. This implies that there is a knowledge gap regarding the use of the SASA policy by some of the parent governors. This finding is in line with the study of Dibete and Potokri (2021) which emphasises that the SGB, through its finance committee, must make sure that they understand the policies that are related to financial management, because the lack thereof will put too much pressure on this management body.

4.4.2 Theme 2: The challenges that parent governors face in managing the school finances in primary schools

This theme deals with the parent governors' challenges in managing the school finances. This theme arose in response to the research question: What are the challenges parent governors face in managing school finances in primary schools? The participants shared similar challenges. These challenges were categorised into six sub-themes: lack of training provided to the finance committees; the high expectations from the parents towards the finance committee; lack of resources for teaching and learning due to the delay receiving the funds for the schools; allocating funds to schools based on the quintile system; disengagement between the SMT and the SGB; lack of parental involvement.

4.4.2.1 Sub-theme 1: Inadequate training provided to the finance committees

Within this sub-theme, Mrs Lilly and Mr Petals reported being empowered as newly appointed members of the SGB through training and workshops, particularly within the finance committee. However, the training was not done frequently. On the other hand, Mrs Rose indicated undergoing various SGB tailored and beneficial workshops organised by the DoE.

Mrs Rose expressed that:

The lack of consistency in the Education Department's workshops is the issue. I have visited a few, but they are not frequent. A private company recently conducted a helpful session for our school and other neighbouring schools. However, because these workshops are scarce, we find it challenging to understand the requirements and adhere to the guidelines. It is important that we hold more frequent workshops in order to improve our performance as the finance committee.

Mrs Lilly shared that:

When we were elected to be members of the SGB, there was a basic training that was provided by the principal of the school. This was to highlight what the roles of the SGB were and giving us all the required documentation to read to be familiar with the process of running the school and stressing the importance of having an SGB in schools. Another one-day training that I attended was in another school in the area for the SGBs that also spoke of the importance of the SGBs and their roles. This only happened in the first year of our appointment as the SGBs and the attendance was good.

Mr Petals commented that:

Workshops are conducted that include the principals and SGBs of the schools within the surrounding areas, although this is not done regularly. Chairperson, principals, treasurer, and secretary had to be part of this training. This was organised by the district officers from Umbumbulu district.

The above responses imply that in schools under this study, there is a combination of internal and external training opportunities for SGB members, including initial training by the principal, one-day external training, and workshops organised by the DoE. While the workshops were received positively, the frequency of district-organised workshops seems to be inconsistent. The responses also suggest a commitment to ongoing training and development among the SGB members, with an acknowledgment of the benefits derived from such initiatives. Mestry's (2019) findings consistently imply that there is not enough involvement by SGBs in training sessions. Mestry's study showed a gap between the number of training sessions offered by district offices and the real attendance and involvement of SGB members. This indicates the need for more frequent and easily available training opportunities to guarantee SGBs have the skills and knowledge required for efficient financial management in schools.

4.4.2.2 Sub-theme 2: Dynamics of School Finances

Within this sub-theme, the participants shared that they experience high expectations from parents which sometimes leads to them feeling overwhelmed to be part of the finance committee. Parents feel that the financial decisions that are made by the committee directly

impact them and their children. The parents have high expectations that the finance committee will always have all the resources readily available to their children, but it also depends on the resources that have been shared by the department and these would need to be distributed accordingly. The participants expressed the following views:

Mrs Rose briefly explained that:

As a finance committee, we often face high expectations from parents, especially when it comes to the monies that are set aside for the necessities like books and stationery for our learners. Parents often put pressure on us as the finance teams on how the funds should be managed and they often want to see tangible results that assure that we use the money according to their expectations, particularly providing stationery for their children.

Mrs Lilly shared that:

From the government, there is always delay in terms of receiving the funds, the budget is always drawn up and submitted on time, but the department fails to deliver on time, and this makes parents to think that we are not doing our job properly, when all the required documentation has been done in order to be funded by the department of education. This has always caused the parents to panic and demand answers, especially at the beginning of the year, because we may ask them to also buy certain resources for their kids that are required in the classroom such as stationery.

Mr Petals shared the same sentiments:

Not enough funds are allocated to the school as these are no-fee-paying schools and we often have to request parents to assist and be patient with the school in this regard. Some parents go as far as thinking that we keep the money for our own use, which is not the case. We then would normally call in an urgent meeting if there are such conflicts to explain to the parents where the money has been spent and evidence is always provided upon request, because parents always have a certain expectation on how things should be done in terms of providing resources for the school.

From the above responses, it is clear that parents often do not trust the finance committee in terms of how they spend the funds that are allocated to the school by the government. They feel that this can have a negative influence on their children in the classroom. However, the

finding suggests that the finance committees are transparent in how they manage school finances. Nevertheless, parents are sometimes suspicious of their financial management practices due to high expectations. This finding is in line with that of Rangongo, Mohlakwana et al. (2016) who emphasise the importance of promoting transparency and building a sense of trust towards the parents and the community as a whole, by sharing all the records of the funds used on all the activities in maintaining the school. The finding also confirms that of Ntshela (2014) that transparency, trust, and effective financial management play an essential role in meeting parents' high expectations towards their child's school.

4.4.2.3 Sub-theme 3: Lack of resources for teaching and learning due to delays receiving funds

The three participants highlighted that rural primary schools usually suffer from a lack of basic resources due to delayed funding despite the punctual submission of necessary paperwork by schools.

Mrs Rose stressed that:

Teachers always struggle with resources for teaching and learning because of the delay in terms of funding from the Government. We submit documents early, but the resources are only available during a certain period and we as the finance committee, we have to wait for the funds to be made available by the Department of Education.

Mr Petals shared that:

Not enough funds are allocated to the school as these are no-fee-paying schools, making it difficult for us to work as a school, including teachers. Even when funds are paid to the schools, they take long even though the submission by schools is done on time.

Mrs Lilly noted:

From the government, there is always delay in terms of receiving the funds, the budget is always drawn up and submitted on time at the district office, but the department fails to deliver on time. The school is always in arrears and the budget from the previous year is always over-stretched when funds for the new year should be received by the school. As a result, there is a struggle for teaching and learning resources.

Based on the responses made by the parent governors, it appears that there is a sense of frustration due to the delay in receiving funds that are supposed to be paid to the schools by the DBE. This also implies that, due to the delay of funding and insufficient funds available, schools struggle to function as they should, and this seems to have a negative influence on teaching and learning.

According to the DoE, most schools do receive financing at the start of the financial year, which is typically in July (Makhumula, 2020). This finding supports the information put forward by the participants. The schools depend on this funding throughout the year. Furthermore, this study shows that schools typically finish necessary documentation on time, including budget planning and filing.

On the other hand, an independent educational research group found in another study that budget allocation delays are common in schools and a significant number of schools receive funds many months after the financial year begins (Rangongo, Makofane et al., 2016). Lack of resources has been connected to these delays, which may have a negative impact on teaching and learning objectives.

4.4.2.4 Sub-theme 4: Financial challenges in schools within low-income communities

All the participants indicated that, as their schools are in the poorest quintiles, they experience financial challenges and rely on the government for funding. Schools experience financial challenges as many parents and guardians are either unemployed or have salaries that are insufficient to meet the costs of their child's education. As a result, these schools are struggling to effectively support the basic teaching and learning activities.

Mrs Rose explained that:

Our school ended up being a no-fee-paying school, as it was always difficult to receive fees from the parents, and this made this school to fall under Quintile 1 because it falls under a low-class social rank community. Most parents are unemployed, and they depend on government grants in order to survive.

Mrs Lilly expressed that:

This is a Quintile 1 school. Most parents are unemployed, and others do not receive enough salaries. Therefore, there are no fees that are paid by the parents. The school

relies on government funding and the process takes long because the funds are normally available in the following year.

Mr Petals said the funds are also generated through fundraising:

The fact that we are in a rural area, it's difficult to have all the required resources. The members of the community are unable to afford their children's education and therefore, no fees are paid by the parents. Our school is located in an area that makes it fall under Quintile 2.

The above quotes highlight the financial challenges faced by schools under study leading them to be categorised under Quintile 1 which indicates a lower socio-economic status. In support of the above findings, a study by Dibet (2015), confirms that schools are also grouped into quintiles to remedy previous educational inequalities. As has been mentioned, Quintiles 1-3 are schools which are mostly located in rural and suburban regions, and these are usually no fee-paying schools. As most parents in the community are unemployed or earn insufficient salaries, the schools struggle to collect fees from parents, making them no-fee schools. Thus, the schools rely heavily on government funding, which can be a lengthy process, often resulting in funds becoming available in the following financial year (Diamond, 2015). The lack of funding also makes it hard for the schools to acquire necessary resources.

4.4.2.5 Sub-theme 5: Disengagement between the School Management Team and the School Governing Body Power dynamics and communication challenges within School Governance Structure

When participants were asked about the challenges they experience as parent governors within the finance committees, all participants indicated that they experience exclusion with regard to important financial decisions in their schools.

Mrs Rose stated:

I sometimes experience a lack of effective communication between the SGB and the SMT. As the SGB we often find out about important decisions after these have already been discussed, and we sometimes feel excluded on the decision-making process of our school.

Mrs Lilly shared her thoughts:

With regards to the challenges that we experience as the finance committee serving within the SGB, I feel that there is sometimes power dynamics within our school. I often observe that the SMT has a bigger voice in terms of making decisions and our role as the SGB is usually just a basic one.

Mr Petals explained that:

There is often a competition in leadership amongst the SGB and the SMT. I often feel that the SMT usually makes more decisions without consulting the SGB and this creates power imbalance and a sense of frustration when the SGBs perform their roles and responsibilities.

Thus, it is clear that the finance governors experience a lack of purpose and feel undermined by the SMT when it comes to the decision-making processes. These responses also reveal that important decisions are often made without prior consultation or notification to the SGB as a whole, leading to a sense of exclusion from the decision-making process. This lack of communication hinders the finance committee's ability to fulfil its role effectively. Mphethi (2016) also supports the idea that the SMT tends to have a stronger voice and greater influence over decision-making processes, while the role of the SGB, including the finance committee, is often perceived as limited. This power imbalance may diminish the finance committee's ability to actively contribute to financial management and decision-making. Furthermore, Nkanyane and Schoole (2020) agree with the above statement and have also expressed that the SMT may make decisions without adequately consulting the SGB, causing frustration and a power imbalance within the governing structure. This dynamic creates obstacles for the finance committee in effectively carrying out its roles and responsibilities.

The SGB's aim is to be engaged and actively involved in shaping school policy, as well as ensuring that educators, parents, and community members' ideas are heard and represented (Mphethi, 2016). Constant communication, mutual respect, and consultation are essential for ensuring good collaboration between the SGB and the school's management team (Nkanyane & Schoole, 2020). When both the SGB and SMT collaborate effectively with one another, it opens up an opportunity to discuss issues, share ideas, and provide constant feedback where necessary.

4.4.2.6 Sub-theme 6: Lack of parental involvement

All three participants reported that they experience challenges regarding parental involvement, which is due to their busy schedules. They also indicated little parental engagement when decisions are made making it challenging to shape school policies which requires parents' different perspectives.

Mrs Lilly explained:

Parents are always over committed on their day-to-day duties, and some are not able to make it to meetings when they have been invited to discuss certain matters pertaining the school. Even when they avail themselves, they do not fully participate when decisions have to be made.

Mr Petals responded that:

As much as we try by all means to involve parents in our schools, one thing I have recognised is that as much as parents play a very important role in education, it is a challenge to get them to engage during decision making. One of the main hurdles that we face is a barrier such as busy schedules from the parents and a lack of support towards their child's learning journey.

Mrs Rose stated that:

Although many parents struggle with balancing day to day tasks with other duties, they have an intense desire for their children's education. However, parents often find it challenging to play an active role in the school affairs of their children. This often results in them finding it difficult to have practical means of communicating with the school, especially towards decisions that need to be made that focus on running of the school.

The comments show that parent governors within the finance committees experience the challenge of parents who often find it difficult to attend meetings due to their busy schedules. Even when parents manage to attend school meetings, their level of participation in decision-making is not satisfactory.

Looking at the above views from the participants, it is evident that parental involvement remains a huge challenge in primary schools; the SGB does invite the parents to share their ideas towards certain matters that may arise, but the parents seem disinterested. These findings

are in line with the study of Desimore and Daviso (2020) which highlights the lack of parental involvement in schools and how this can affect the decision-making process. The SGB, together with the finance committee, needs to consider the perspectives that come from different homes to cater for each child's needs, but this can only be achieved if they work as a team. Despite having busy schedules, it is also crucial for parents to recognise the impact their involvement can have on their child's education. The SMT, the SGB and the parents need to work collaboratively to ensure that they create a supportive and inclusive environment for their learners. According to Desimore and Daviso (2020), it is important to tackle issues of parental involvement collaboratively with parents, as there are always unique circumstances and better strategies to attract parents to engage in the school community. Increased parental involvement can also lead to improved academic achievement, better motivation, and a greater overall wellbeing.

The reason parents might not be actively involved in their child's learning is that parents do not have a clear understanding of where to begin or how to engage in this. It is then highly advisable for the school to provide a clear guidance on how parents can get involved; this can be through voluntary opportunities, being part of communication channels, or attending workshops provided by the school (Puccion et al., 2020). When there is a visible roadmap for parental involvement, the SGB and the parents as a community can work together and provide a more successful educational school environment for their children.

4.4.3 Theme 3: The strategies parent governors use to address the challenges they face in the financial decision making in primary schools

In response to the research question: How do parent governors address the challenges they face in managing school finances in primary schools? the following sub-themes emerged: Innovative solutions to financial constraints; power of collaboration; Importance of transparency in organisational dynamics; Sharing common goals and a clear vision; Delegation of tasks.

4.4.3.1 Sub-theme 1: Innovative solutions to financial constraints

Participants indicated that due to financial budget constraints, as finance committees, they have to find creative solutions in order to ensure that the teaching and learning continued.

Mrs Lilly explained that:

To deal with the shortage of funds, we sometimes find ourselves having to be creative. We overstretch the budget because the teaching and learning must continue. We prioritise what needs to be paid for at that particular time. We also use as little as we can in order for the funds to be available even in the following year.

Mrs Rose said that:

When it comes to dealing with a shortage of funds in schools, it is important to get creative and explore alternative strategies to make the most of available resources. At our school there are different activities that we get involved with for generating funds, these are activities such as forming fundraising committees so that ideas can be shared on which events can be done to have petty cash for the school. We also formed a partnership with one of the companies which donated certain items that were needed by the school.

Mr Petals shared that:

As finance committee we are forced to think out of the box and fast. Because of the challenges we go through as a school especially, main one which is the shortage of funds, we need to come up with ideas that will help generate quick funds. Sometimes we ask the learners to wear civvies every Friday and they contribute R2. The money collected is used for school maintenance such as printing machines and buying photocopying paper.

The above quotes imply that parent governors within the finance committees acknowledge that schools experience challenges including the shortage of funding. However, they do not allow that to disrupt the functioning of schools. Instead, they use their creativity to come up with solutions which include fundraising through civvies day and partnering with companies that donate money to keep schools functional.

The above finding is similar to the study of Campher (2020), who speaks of how the parent governors are also able to indicate a number of strategies that they use when dealing with a shortage of funds at schools. These strategies are to prioritise expenses according to urgency and importance. This approach also helps ensure that the most critical needs are met despite the limited funds. The finance managers also revealed that due to the shortage of funds they have to come up with creative ways to generate money whilst they are waiting for the state funding. These creative ways include fundraising activities, involving learners in the

fundraising activities and forming partnerships with certain companies. It is clear that despite the financial challenges that the finance governors experience, they are still able to come up with creative ways to generate funds.

Other fundraising ways mentioned in this section are those of learner involvement, where learners are encouraged to help the schools raise funds by having a ‘civvies day’. This type of involvement not only helps to generate funds, but it also helps to create a sense of participation and ownership within the school community. Another important aspect of this strategy is consideration of families’ financial circumstances and when planning activities; these must be enjoyable and accessible to all learners. These responses highlight the financial challenges faced by schools, with an emphasis on prioritising certain needs, creativity and learner involvement, which can help mitigate the challenges and make the most of the available resources.

The participants demonstrated an understanding of how to reach out to businesses, individuals, and communities to explore potential sponsorship and partnership alternatives. When it comes to raising funds and developing relationships with local businesses, the school can choose businesses that possess a strong interest in education; they may provide resources, services, and programmes that can help alleviate some of the financial constraints (Getahum, 2018).

4.4.3.2 Sub-theme 2: The Power of Collaboration

In this sub-theme, the participants noted that working in collaboration with the other staff members can often involve an opportunity for them to learn new skills from other professionals. This strategy has been used in the three primary schools to solve problems that arise and also to assist with resource distribution.

Mrs Lilly shared that:

I believe that one can never make decisions without consulting the other team members; working in collaboration with my colleagues allows me to become a better person, because I can also learn from them. We also get to share ideas on how to share the available resources for accommodating the learners in the classroom.

Mrs Rose explained that:

Working in collaboration with the other members of the management and teaching staff, creates a sense of culture towards the school and this can also bring a positive

atmosphere in the school. Consulting other team members promotes support and room for one to be constantly developed. When we work collaboratively, the school itself can have a good learning environment that maximises the well-being of our learners.

Mr Petals shared the same sentiments:

I feel that when we work in collaboration, we can engage with one another and share the practices in solving problems that arise within our school. It's always the best idea to consult the professionals that are more exposed to the day to day running of the school and collaborate with them. One can actually learn so much from doing this, and it creates a good bond within the school.

This finding suggests the power of collaboration to solve problems in schools can be one strategy to address the challenges that parent governors face. By working together, parent governors within financial committees and other stakeholders such as staff members are able to enhance decision-making, foster a positive school culture and create supportive learning environments within which schools are able to function, despite the financial challenges schools experience.

The above findings concur with the study of Dlomo et al. (2022), which discusses how the educational leaders and staff members can foster a positive school culture to improve the outcomes of the learners, through working in collaboration. This study further states that working in collaboration within the management of the school promotes shared expertise, improves the skill of problem-solving, and communication, and strengthens the relationship amongst the staff members. This can also promote collaboration within the present study, as highlighted by the parent governors' responses and there can be a better understanding of how the schools' resources should be allocated within the relevant departments with a greater opportunity to improve the school culture. The findings described also fit well with the principles of PDT. According to this theory, inclusive processes of decision-making involving different types of stakeholders are encouraged since they promote shared skills, improved problem-solving skills, improved collaboration, and better staff relationships.

4.4.3.3 Sub-theme 3: Importance of transparency in organisational dynamics

In this theme all the parent governors indicated that they viewed transparency as the most important practice to build trust amongst one another. They said that they believed that

transparency could assist in avoiding misunderstandings and promoting a clear engagement towards the school management.

Mr Petals shared that

As a member of the School Governing Body serving within the finance committee, I always appreciate having access to important information regarding the financial matters of the school. Therefore, I believe that transparency is important when making financial decisions.

Mrs Rose noted that:

Transparency creates a good and positive environment where a foundation of trust is created. When we all know what is happening within the school, it shows that we work as a team.

Mrs Lilly commented that:

In such an organisation that needs members to work well with one another, I always value transparency, when we are all open to one another and are honest about how we do things, we can grow professionally.

The above quotes suggest that the parent governors understand that transparency is essential for promoting trust and teamwork. The finding also implies that the parent governors believe that by fostering an environment of openness and honesty, schools can enhance collaboration, and communication, which can enable schools to achieve educational goals more effectively. This finding supports the findings of Gabriel and Ong (2018) who state that transparency and accountability are equally important in managing schools' financial resources. Furthermore, when the finance officers receive information about the school's decisions and activities that are taking place within the school, they too feel important. This also helps them stay informed of all the school's everyday activities. They feel respected and valued when critical information is shared with them, as this provides a clearer picture about what is required of them within their respective portfolios. Transparency in an organisation allows stakeholders to work well together without experiencing any forms of misconduct, and it ensures all important issues or matters are shared without keeping important information from each other (Gaspar et al., 2022).

Transparency and accountability are equally important in managing school's financial resources (Gabriel & Ong, 2018). Transparency serves as an essential requirement to ensure the proper use of resources, whereas accountability ensures that all managers who are responsible for managing public resources, and all other required features associated with them are held accountable. This includes ensuring that the management can answer questions about how the school operates as an organisation. Thus, transparency can have a positive impact within the workplace and management. Having a supportive work environment can also promote development amongst staff members and the SGB as a whole.

4.4.3.4 Sub-theme 4: Sharing common goals and a clear vision

All the participants in this study expressed a belief that having common characteristics, and a clear vision of the school made their job easier. All the participants maintained that it is important to share a common vision when working together as a team, this helps them to work well with one another and be committed to what they want to achieve in the school.

Mrs Rose believed that:

Having a shared vision amongst our finance committee members helps us work together to ensure that our financial decisions promote the overall achievement of our learners and the school community.

Mr Petals alluded that:

As the finance committee serving within the school governing body, we have a common goal, which is, maintaining the status of being responsible managers towards the school's financial resources.

Mrs Lilly said that:

Having the same set of goals towards running the school as we do is important because it helps us ensure that the school is allocated funds efficiently in order for teaching and learning to continue. This helps in realising the vision of our school to ensure that equal educational opportunities are experienced by all our learners irrespective of their socio-economic status.

The above quotes imply that parent governors in this study believe in the significance of unity, shared vision and responsible management of school finances within finance committees in schools to address challenges. Having common goals is perceived to contribute significantly

to the success of the teams. This is in line with what Sanyal and Hasim (2018) propose, that teams with a shared vision have greater coordination and less conflict than teams without a shared vision.

The participants within the primary school's finance committee realise the importance of having common goals and a clear vision on how to run the school. Having similar shared values and a unified vision can contribute significantly to the success of a team. It is also evident that if every team member is aligned with the same vision within their schools, this can create a clear sense of mutual understanding and commitment. In this regard the finance committee in rural primary schools aims to prioritise their objectives of their day-to-day tasks and make decisions that are in line with the overall goals of the school. Such commitments provide a clear guide and reassurance that everyone is working towards the same goal. This form of teamwork can promote more efforts being made towards achieving certain goals, minimise conflicts and promote overall efficiency. When the members of a committee have the same characteristics, they can contribute to togetherness and a more productive team dynamic. Similar work ethics, values, and dedication to the mission of the school as an organisation can create a sense of mutual trust and friendship, enabling a smoother collaboration amongst the team members.

4.4.3.5 Sub-theme 5: Delegation of tasks

All participants indicated that they delegated tasks to members within SGBs. While all three participants indicated that they adopted a strategy of delegating tasks, Mrs Rose shared that she delegated based on members' strengths and expertise. Mrs Lilly indicated that her doubts were due to her being a female chairperson.

Mrs Rose shared that:

It is always important to identify one's strengths and areas of expertise within the finance committee. By identifying one's strongest skills and knowledge, tasks are then assigned accordingly to promote their strengths. Sometimes one is unsure if the members of the team will agree to such a commitment because they may feel that you are controlling everything. However, the process is always a success, because most SGB members are usually up for the challenge. Just to share an example regarding this, a member of the SGB may have a strong background of accounting and mathematics. That member is usually assigned to draw the budget as we believe that

they have the necessary skills, when we delegate tasks, as finance committee member we provide feedback to the principal as an accounting officer to the department of education.

Mrs Lilly admitted that:

As a female chairperson, sometimes I worry about the males within the school governing body when delegating tasks. I am always wondering if they will listen to me as a female. However, I am surprised because they accept and ask for clarity where they do not understand.

Mr Petals highlighted that:

I enjoy the way that our finance team interacts with one another when there are tasks that need to be completed. Since every individual is unique, we are able to make better decisions based on our skills and to whom the task can be allocated to. It makes us all feel involved when we communicate honestly and clearly. When we collaborate, we accomplish greater things.

As seem from the quotes, parent governors in this study delegate tasks to members based on their strengths and expertise. The finding suggests that parent governors require empowerment with skills in order to be more confident when delegating. Although Mrs has indicated that she does delegate tasks to the SGB, she revealed that sometimes she is uncertain if the team trusts her with ensuring that the work is done accordingly, but she has witnessed that the members are usually eager to learn and are therefore always up for the new challenge that is provided to them.

Mrs Lilly explained that as she is a female, she sometimes feels less confident in delegating tasks to the SGB members who are males. Sometimes she finds herself in a situation where she is overloaded with work, but to decrease the workload she often does delegate tasks to the other SGB members, emphasising that this will give them an opportunity to learn new things within their respective portfolios.

The above findings are in line with those of Mestry (2013), who highlights that delegating tasks can pose a good outcome for the entire team, as it promotes a shared sense of responsibility and development among members. However, when you give others new responsibilities, this can foster a collaborative and more supportive work environment, encouraging everyone to focus on their strengths and contribute to the school's success.

Furthermore, delegating tasks can benefit the entire team and managers need to remind themselves that, irrespective of one's gender, everyone has potential and should have an equal opportunity to do outstanding work within their roles (Shava et al., 2019). In a situation where one staff member feels overwhelmed with work, it is important to distribute work evenly to other team members to lighten the workload. This also gives other team members the chance to learn new skills within their respective portfolios.

4.4.4 Theme 4: Support needs of parent governors

In response to the question: What kind of support do parent governors need in order to manage the school finances? two sub-themes emerged: school-based support and support from the DoE.

4.4.4.1 Sub-theme 1: School-based support

When participants were asked about the kind of support they needed to manage school finances, Mrs Rose and Mrs Lilly indicated that they need school-based support. Mr Petals mentioned that he is getting all the necessary support from school. In this theme, the participants made it clear that they need to work closely with the School Management Team (SMT) as it plays a crucial role in supporting parents in the financial management within the SGBs.

Mrs Rose noted that:

We also need the support from the school itself. Because the school have people who are working there, like the teachers and staff, so that support also from the school management and from the community is needed by the parent governors in order to survive within their portfolios.

Mrs Lilly revealed that:

We would like for the School Management Team to support us more when it comes to decision-making of the school and develop us as the school governing body.

Mr Petals commented that:

In terms of support, I think we get all the support in our school because the SGBs and the members of the school, we work well together; there is that understanding and

respect between these two bodies, SGBs and the School Management Team as well, although we don't see them as much as we should.

This finding highlights the importance of the school stakeholders' support to SGBs and how important collaboration is between stakeholders within the school community. The above quotes are in line with Campher's (2020) study, where he shares that there are some schools where SGB members are supported. This speaks of the need for mutual respect, understanding and cooperation among members of the school community to ensure school success and wellbeing of learners. Furthermore, when a parent governor lacks the essential skills and knowledge for efficient school financial management, the SMT can assist within the schools. Collaboration between SMTs and SGBs' financial managers can improve parents' abilities by establishing mutually beneficial relationships and understanding between principals, parents, and teachers. Collaboration can improve the efficient use of educational resources for the benefit of the school and students (Campher, 2020). It is thus critical for SMTs to provide support to parents in order to promote empowerment within their portfolios. Guidance such as ongoing training, distribution of resources, collaboration opportunities, and ongoing support can help parent governors fulfil their roles and responsibilities with confidence, as well as contributing effectively to the school's financial decision-making processes.

4.4.4.2 Sub-theme 2: Support from the Department of Basic Education

All the participants in this study indicated that they needed support from the Department of Basic Education.

According to Mrs Rose:

Receiving assistance from the Department of Education is important for us as the finance committee to carry out our tasks. Their guidance can help us improve our ability to make informed decisions and manage the school's finances.

Mrs Lilly said:

I believe that we need the Department of Education's assistance in order to carry out our duties as members of the finance committee. Their knowledge and support can guide us through difficult financial situations and ensure that we meet the department's requirements for educational achievement.

Mr Petals stated:

We need more support from the Department of Education to be able to do our job as the finance committee.

These comments imply that parent governors within finance committees in this study require more support in order to feel empowered by the DBE as they believe that, that could assist in performing their roles more efficiently (SASA, 1996a). The findings from Mrs Rose and Mr Petals indicates that there is a need for more support from the DBE, it is however evident that the support from the DBE is there but inadequate.

The participants' remarks make it clear that the DBE needs to provide guidance to the finance committee in order to support its decision-making procedures. Furthermore, the parent governors expressed a need for support from the DBE in order to feel more confident in their roles on the finance committee. Collaboration with the DBE can give significant information, and assistance in school financial management (Mohapi & Netshitangani, 2018). The DBE's involvement and support can contribute to a more robust and well-informed decision-making process within the finance committee. It is critical to realise the importance of interacting with relevant stakeholders, such as the DoE, in order to develop financial management procedures and guarantee that the school's resources are best used to support educational objectives.

4.5 Chapter summary

This chapter discussed the findings from the semi-structured interviews. Three SGB members who are parent governors within the finance committee, in the Umbumbulu district in KwaZulu-Natal participated in interviews and shared their thoughts on their experiences as parent governors serving in primary schools. In the findings presented, contrasts and connections between similar subjects or themes were identified from the responses of the three participants and these were presented thoroughly. The patterns that emerged from the interviews with the three participants were clarified through the use of thematic analysis. The next chapter provides a summary of the study, conclusions and recommendations.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

The previous chapter presented the findings generated from data. This is the last chapter of the study, where a summary of the study, research questions, conclusions drawn from findings, recommendations, future recommendations for the future research of the study and chapter summary were provided.

5.2 Summary of the Study

This study explored the experiences of parent governors from three primary schools. The purpose of this research was to explore parent governors' experiences of financial management of school finances in selected primary schools at the Umbumbulu District. The study's chapters are summarised below.

5.2.1 Chapter 1

The aim of the study was to explore the parent governors' experiences in financial management as part of their role in SGBs in selected primary schools within the Umbumbulu District. I began by presenting the background of the study, providing important context for the research. The reasons and motivations behind conducting the study, highlighting what sparked my interest in the topic, was carefully explained. The aims and objectives of the study as well as the research questions were also discussed. Furthermore, the chapter specifies the scope and boundaries of the study, clarifying what would be included and excluded from the analysis. The chapter concluded with an outline of the entire dissertation, giving a comprehensive breakdown of what would be included in the various chapters.

5.2.2 Chapter 2

This chapter provided a comprehensive overview of existing research, established the importance of the current study, and addressed various aspects related to parent governors' experiences in financial management within the context of schools. Finally, a theoretical framework which is known as PDT, was discussed. This theory shed light on the experiences and complexities facing the parent governors in the field of practice.

5.2.3 Chapter 3

This chapter presented the methods that were undertaken to complete this research. The research paradigm, design, and approach used for data generation were described. Sampling techniques and judgment of trustworthiness including credibility, transferability, dependability and confirmability were discussed. The data analysis processes were also explained, along with a brief profile of the research participants and their schools. Ethical issues and the limitations of the study were discussed.

5.2.4 Chapter 4

This chapter examined the findings of semi-structured interviews with three SGB members from finance committees of schools in the Umbumbulu circuit of KwaZulu-Natal. The chapter provided detailed descriptions and interpretations of the data, highlighting key insights and patterns. The participants' perspectives offer valuable insights into the unique experiences and challenges faced by parent governors in rural primary schools, particularly in financial management and decision-making.

5.3. Main Research Question

The main question that was used to frame the study as a whole was: What are the parent governors' experiences of financial management in selected primary schools in the Umbumbulu district?

5.3.1 Research Questions

A summary of the research findings was organised based on four research questions that were used in this research. This study was guided by the following critical questions:

- How do parent governors understand their role in the financial management of school finances?
- What challenges do parent governors face in managing school finances?
- What are the strategies that parent governors use to address the challenges they face in managing school finances?
- What kind of support do parent governors need to manage school finances?

5.4 Conclusions Drawn from Findings

This section presents the conclusions derived from the findings of the study to address each critical question.

5.4.1 Parent Governors' understanding of their roles in school financial management

This question explored the parent governors' understanding of their roles in the management of school finances. Parent governors showed to have a basic understanding of their roles on the School Governing Body's financial committee. Parent governors are aware that they are elected to represent the interests of the parent community through an open and democratic election process, indicating a significant advocacy role within the SGB. Even with different levels of formal financial education, the parent governors revealed that they are committed to playing out their roles and responsibilities. Furthermore, their aim is to speak out for parents' concerns and build strong parent-school relationships that encourage open communication and trust. Although most of the participants were aware of the policies controlling school budgets, a few individuals might not be as familiar with specific legislation like the SASA, which is one of the policies they need to consult in the keeping of the financial records and running of the schools. The findings show that parent governors are generally engaged and dedicated to monitoring school finances and working for parent interests within the SGB. Nevertheless, they also point to the requirement of continued training to improve the way they perform in carrying out their monitoring roles.

5.4.2 *The challenges parent governors face in managing school finances*

Within this theme a research question was explored where parent governors were asked to share challenges they face in managing school finances when serving within the finance committee. Parent governors face a number of challenges in managing school finances and this is evident that it is usually due to inadequate training when they are elected to be part of the School Governing body and then re-elected to serve within the finance committee, high parental expectations, delays in funding from the department of Basic Education, financial struggles in low-income communities, which categorises schools based on the 1-5 quintile system, poor working connection between the School Management Team (SMT) and the School Governing Body (SGB), and limited parental involvement were some of the challenges they experienced. However Inadequate training, lack of resources in schools, and high

expectations can lead to poor financial management in schools. The parent governors further expressed that, although they submit the schools' budget on time, they still experience challenges when it comes to receiving funds from the Department of Basic Education, such challenges, particularly in low-income areas, can negatively delay the availability of resources and the teaching in schools. Additionally, schools in low-income communities rely heavily on government funding, this is due to the fact that most parents have low income jobs or are unemployed, leading to an inability to pay school fees for their children.

5.4.3 The strategies that parent governors use to address the challenges they face in managing school finances

Within this this theme, a research question emerged where parent governors were asked to expressed different strategies they use to address the challenges they face in managing the school finances. It then concluded that parent governors demonstrate creativity in financial management, prioritising expenses and forming partnerships with businesses. Working in Collaboration among finance committee members and stakeholders is crucial for effective decision-making and creating a positive school culture. Transparency is another strategy that is important for building trust and ensuring successful communication. A shared vision and common goals will assist the parent governors in improving team performance and decision-making. Parent governors also expressed that identifying each other's strongest points can assist in overcoming the challenges that they face within this portfolio of managing finances in schools. Therefore effective delegation based on individual strengths and expertise is key for managing workload and leveraging skills within the finance committee. These strategies collectively will contribute to successful financial management and a positive educational environment, overcoming financial constraints and achieving primary school goals.

5.4.4 The Support Parent Governors Need to Manage the School Finances in selected Primary Schools in the Umbumbulu District

The research question focused on the type of support needed by parent governors in managing school finances in primary schools. The parent governors indicated their need for assistance from the Department of Basic Education (DBE) which would help to boost their confidence in their duties within the finance committee. Based on this need, it is evident that parent

governors in primary schools need support with managing school finances, this is due to the little confidence and inadequate support they receive from the DBE. This challenge affects their ability to effectively fulfil their roles within the finance committee. According to the study by Mohapi and Netshitangani (2018), working together with the DBE can help provide the financial resources, knowledge, and support that schools need to manage their finances. The DBE's participation and support can have a big influence on the finance committee's decision-making process, making sure that the school's resources are used as efficiently as possible to promote its academic objectives. These findings highlight how crucial it is to interact with relevant parties, such the DBE, to improve financial management procedures in educational organisations.

5.5 Recommendations

The main themes revealed that the duty of being a parent governor comes with its own challenges and it is not an easy role to fulfil, which is why the finance committee needs to be supported by the relevant stakeholders. Therefore, the following recommendations have been made:

During the election process, the finance committee should explain the roles and responsibilities of school governors to stakeholders before elections, and continuously build capacity at the school level.

I recommended that the school organise further workshops or seminars related to financial management or budgeting to further develop financial skills. That would help the participant who expressed interest in being a treasurer. It also evident that there are no engagements between parent governors of selected schools and the provincial education department's officials regarding their situation in managing finances in their schools. I therefore recommend that that parent governors of selected primary schools need to analyse their financial management situation and devise ways in which they can engage with the officials in the Umbumbulu District.

Parent governors on the finance committee discussed the South African Schools Act legislation in school decisions, but there is a lack of knowledge on implementing policies. When parents understand their roles based on being guided by the school and the Department of Basic Education, they would also strive to understand the South African Schools' Act policy

and how it should be implemented in schools. Based on this I recommended that parent education sessions be organised to provide comprehensive explanations of the South African Schools Act and related financial management policies. Simplified materials of the policy should be easily accessible to parent governors, developed by school principals, and provided through school websites and information centres.

The participants expressed that they only have training when they are appointed by the schools to be part of the finance committee, thereafter they are expected to hold meetings on a regular basis and run their duties within their portfolios. However, it is evident that training is provided, but it is inadequate to equip them with enough knowledge of handling school finances. I recommend that the parent governors should request more frequent training on financial management from the school managers such as principals and other relevant stakeholder each term to improve their knowledge of financial management within SGBs. This strategy can support their duties and responsibilities. Seminars which cover budgeting, financial reporting, and resource allocation, the use of technology, through to online banking systems can be used as training opportunities to ensure that parent governors are well equipped to carry out their duties. It may also be beneficial to consider bringing in experts or educators who specialise in school finance management to provide insight and handle specific challenges that the parent governors may face. Such efforts can help to empower parent governors while also enhancing overall financial management within SGBs.

Parent governors also strategies they would implement when faced with challenges within school financial management. I recommend that the financial management of a school should be a collaborative process, involving creativity, collaboration, transparency, alignment with shared goals, and a great focus on members' strengths. This can involve implementing innovative solutions, forming partnerships with local businesses, promoting open dialogue, and maintaining transparency within the school management. Regular meetings and constant communication is important for successful financial management. Each finance committee member should be assigned tasks based on their unique skills and expertise, this will also boost their confidence as individuals during the period they are elected to be member of the School governing body, serving within the finance committee. Furthermore regular evaluation of financial strategies and adjustments are necessary also necessary to prevent any challenges that might arise. Community engagement is important and needs to be implemented, this can be parental involvement, teachers, and community members involved in financial discussions.

These recommendations can help parent governors manage school finances effectively and achieve educational goals while navigating financial challenges.

5.6 Recommendations for future research of the study

For future research of the study, several areas could be explored on the role of parent governors in finance committees, particularly in primary schools, to get a better understanding and improve practice. Exploring which training activities strengthen the functioning of finance committees in schools could be considered as future research. Furthermore, this research can also provide insight into whether various training strategies, such as workshops, mentoring, and peer support, strengthen the skills and performance of parent governors.

5.7 Chapter Summary

This study was informed by four research questions which sought to explore the experiences of parent governors of the finance committees in primary schools that revealed findings that led to conclusions in chapter 4. Lastly the conclusions were explored based on the research questions that were leading in the study. Recommendations and future study recommendations were also made.

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Appendix A



KWAZULU-NATAL PROVINCE

EDUCATION
REPUBLIC OF SOUTH AFRICA

OFFICE OF THE HEAD OF DEPARTMENT

Private Bag X9137, PIETERMARITZBURG, 3200
Anton Lembede Building, 247 Burger Street, Pietermaritzburg, 3201
Tel: 033 392 1051

Email: buyi.ntuli@kzndoe.gov.za

Enquiries: Buyi Ntuli

Ref.:2/4/8/7112

Ms Zandile Bridget Msabala

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Dear Miss Msabala

PERMISSION TO CONDUCT RESEARCH IN THE KZN DoE INSTITUTIONS

Your application to conduct research entitled: **“FROM A PARENT TO A FINANCIAL MANAGER: NARRATIVES OF PARENT GOVERNORS’ SERVING IN RURAL SCHOOLS’ FINANCE COMMITTEES”**, in the KwaZulu-Natal

Department of Education Institutions has been approved. The conditions of the approval are as follows:

1. The researcher will make all the arrangements concerning the research and interviews.
2. The researcher must ensure that Educator and learning programmes are not interrupted.
3. Interviews are not conducted during the time of writing examinations in schools.
4. Learners, Educators, Schools and Institutions are not identifiable in any way from the results of the research.
5. A copy of this letter is submitted to District Managers, Principals and Heads of Institutions where the Intended research and interviews are to be conducted.
6. The period of investigation is limited to the period from 08 June 2021 to 31 August 2023.
7. Your research and interviews will be limited to the schools you have proposed and approved by the Head of Department. Please note that Principals, Educators, Departmental Officials and Learners are under no obligation to participate or assist you in your investigation.
8. Should you wish to extend the period of your survey at the school(s), please contact Miss Phindile Duma at the contact numbers above.
9. Upon completion of the research, a brief summary of the findings, recommendations or a full report/dissertation/thesis must be submitted to the research office of the Department. Please address it to The Office of the HOD, Private Bag X9137, Pietermaritzburg, 3200.
10. Please note that your research and interviews will be limited to schools and institutions in KwaZulu-Natal Department of Education.

[REDACTED]
Dr. EV Nzama
Head of Department: Education
Date: 08 June 2021

Appendix B

LETTER OF REQUEST TO DEPARTMENT OF EDUCATION



Attention: The Head of Department (Mr
G.N Ngcobo) Department of Education
Province of KwaZulu-Natal

Private
Bag X9137
Pietermaritzburg
3201

Dear Mr Ngcobo

REQUEST FOR PERMISSION TO CONDUCT RESEARCH

My name is **Zandile Msabala**, a Master of Education student studying at the University of KwaZulu-Natal, School of Education (Edgewood Campus). As part of my degree requirements, I am required to conduct research. I therefore kindly seek permission to conduct research in three selected primary schools under your jurisdiction in the Umbumbulu District . The title of my study is: **PARENT GOVERNORS' EXPERIENCES OF FINANCIAL MANAGEMENT AT UMBUMBULU DISTRICT**

This study focused on the experiences of selected primary school parent governors in financial management in the Umbumbulu district of KwaZulu-Natal. The study will use semi structured interviews. Participants will be interviewed for approximately 4560 minutes at the times convenient to them which will not disturb teaching and learning.

Each interview will be voice-recorded.

Responses will be treated with confidentiality and pseudonyms will be used instead of the actual names. Participants will be contacted well in advance for interviews, and they will be purposively selected to participate in the study. Participation will always remain voluntary which means that the participants may withdraw from the study for any reason, anytime if they so wish without incurring any penalties.

You may contact my supervisors, UKZN Research Office or myself should you have any queries or questions.

I (Zandile Bridget Msabala) can be contacted at:

Email:

za.msabala@gmail.com

████████████████████

My supervisor is Dr. N.I. Jaca, at the School of Education, Edgewood Campus of the University of KwaZulu-Natal.

Her contact details: e-mail: Supervisor: Dr. J.N Jaca ; Phone number: (031) 260 1870

For additional information, you may also contact the UKZN Research

Office through: HSSREC@ukzn.ac.za

Your anticipated positive response in this regard is

highly appreciated.

Yours sincerely

.....

Miss Z. Msabala

APPENDIX C

The Principal

Dear Sir/Madam

REQUEST FOR PERMISSION TO CONDUCT RESEARCH AT YOUR SCHOOL

I am Zandile Msabala and I am conducting a research as a requirement of the University of KwaZulu-Natal towards a **Degree of Masters in Educational Leadership, Management and Policy**. The title of the research study is **“PARENT GOVERNORS’ EXPERIENCES OF FINANCIAL MANAGEMENT AT UMBUMBULU DISTRICT”**.

I would like to use your school as one of the research sites, and this letter intends to request your permission. The focus of the study is on the finance committee; therefore, I would like to request your SGBs to participate in the study. Should permission be granted, the interviews with the SGB will be scheduled for dates and times that are convenient for *him or her or them*. Care will be taken that no disruption is caused during such interviews. Please also note that the participation in this study is voluntary, and the participant has the right to withdraw from the study at any time without any negative consequence. In addition, you are assured that details of the school and the participant will be kept confidential, and your identity will never be disclosed to anyone.

For more information and questions about the study, you may contact the researcher or the research supervisor on the following details:

Name of researcher C [REDACTED] email: za.msabala@gmail.com

Supervisor: Dr. J.N Jaca; Tel No.: (031) 260 1870; Email: JacaN1@ukzn.ac.za

You may also contact the Research Office through:

P. Mohun

HSSREC Research Office,

Tel.: 031 260 4557 E-mail: mohunp@ukzn.ac.za

Thanking you in advance.

Yours in Education

.....

Miss B.Z Msabala

Appendix D

LETTER TO GATEKEEPER (PRINCIPAL)

PERMISSION FROM GATEKEEPER (PRINCIPAL)

Dear: Zandile Msabala

PERMISSION TO CONDUCT RESEARCH AT MTHOMBENI PRIMARY SCHOOL

Your letter titled "Request to conduct research..." has reference. Please be informed that you are granted a permission to conduct your research at the above mentioned school.

Yours sincerely



School stamp

Name of Principal

Appendix E

LETTER TO PARTICIPANT

[REDACTED]

[REDACTED]

4126 03/03/2023

Dear participant :

REQUEST FOR PARTICIPATION IN THE RESEARCH

I am **Zandile Msabala** and I am conducting a research as a requirement at the University of KwaZuluNatal towards a Degree of Masters in Education Leadership Management and Policy. The title of the research is "**PARENT GOVERNORS' EXPERIENCES OF FINANCIAL MANAGEMENT AT UMBUMBULU DISTRICT**".

". The objectives of the study are:

- To explore the parent governors' understanding of their role in the management of school finances.
- To understand challenges parent governors face in managing school finances.
- To understand strategies parent governors use to address the challenges they face in managing school finances.
- To identify the kind of support that parent governors need to manage school finances.

The study will focus on Experiences of parent governors serving in the finance committees. This letter intends to elucidate the purpose of the study and to request your participation in the study.

Please note that:

- Your confidentiality is guaranteed as your inputs will not be attributed to you in person, but reported only as a population member opinion.
- The interview may last for about 1 hour and may be split into two parts depending on your preference.
- Any information given by you cannot be used against you, and the collected data will be used for purposes of this research only.
- Data will be stored in secure storage and destroyed after 5 years.

- You have a choice to participate, not participate or stop participating in the research. You will not be penalized for taking such an action.
- Your involvement is purely for academic purposes only, and there are no financial benefits involved.
- If you are willing to be interviewed, please indicate (by ticking as applicable) whether or not you are willing to allow the interview to be recorded by the following equipment:

	Willing	Not willing
Audio equipment		

I can be contacted at:

Email: ...

Cell: ...

My supervisor is Dr. J.N Jaca who is located at the School of Education, at the University of KwaZulu-Natal. She can be contacted at:

Email:

Phone:

In the event of any problems or concerns/questions you may contact the researcher or the UKZN Humanities & Social Sciences Research Ethics Committee, contact details as follows:

HUMANITIES & SOCIAL SCIENCES RESEARCH ETHICS ADMINISTRATION

Research Office, Westville Campus

Govan Mbeki Building

Private Bag x54001

Durban

4000

KwaZulu-Natal, SOUTH AFRICA

Tel: 27 31 2604557- Fax: 27 31 2604609

Email: HSSREC@ukzn.ac.za

I hope this letter will find your positive consideration, thanking you in advance.

Yours Sincerely

Name and surname

PLEASE COMPLETE THE FOLLOWING SECTION FOR CONSENT OF PARTICIPATION:

I _____ (Full names of participant) hereby confirm that I understand the nature and purpose of the study entitled: **FROM A PARENT TO A**

MANAGER: PARENT GOVERNORS' EXPERIENCES OF FINANCIAL MANAGEMENT AT

UMBUMBULU DISTRICT I agree to participate in the study. I am also fully aware that I have the right to withdraw from the study at any point should I wish to do so, without any negative or undesirable consequence. I am also aware that there are neither any foreseeable direct benefits nor direct risks associated with my participation in this study. I therefore understand the contents of this letter fully and I do **GIVE CONSENT / DO NOT GIVE CONSENT** for the interviews to be digitally recorded.

Signature

Date

School stamp

Appendix F

DATA GENERATION TOOL

INTERVIEW SCHEDULE FOR PARENT GOVERNORS

Research Interview Questions:

1. How long have you served as a member of the SGB in this school?
2. Have you ever served as an SGB member in another school before this one?
3. If so, tell me about your experiences.
4. Can you explain the process of selecting SGB members, specifically those serving on the finance committee?
5. What is your role within the SGB?
6. Would you say, you are fulfilling that role?
7. If so, please elaborate.
8. If not, please explain why not.
9. What would you say is the purpose and scope of the finance committee within the SGB?
10. Can you please tell me about policies and regulations that guide the decision-making processes of the finance committee?
11. In your opinion, what is the primary reason for having a finance committee within a school's governing structure?
12. What is your understanding of the role and responsibilities of a School Governing Body (SGB)?
13. What kind of training did you receive when you were selected to serve on the SGB and finance committee??

14. Can you say that you now have the necessary skills and knowledge to effectively carry out financial responsibilities within the finance committee?
15. What kind of support do you believe would be beneficial for members of the finance committee?
16. What kind of support do you receive as SGB members in this school?
17. What kind of challenges do you encounter in your role as a member of the SGB or finance committee?
18. If any, how do you address those challenges?
19. Is there anything else you would like to share with regard to your experiences as a member of the SGB and /finance committee?
20. Thank you for your time and willingness to participate in this study.

Appendix G

FROM A PARENT TO A MANAGER: PARENT GOVERNORS' EXPERIENCES OF FINANCIAL MANAGEMENT AT UMBUMBULU DISTRICT

ORIGINALITY REPORT

4%	%	4%	0%
SIMILARITY INDEX	INTERNET SOURCES	PUBLICATIONS	STUDENT PAPERS

PRIMARY SOURCES

1	Ramashego Shila Mphahlele, Mncedisi Christian Maphalala. "Contextualising Rural Education in South African Schools", Brill, 2023 Publication	1%
2	Mncedisi Christian Maphalala, Ramashego Shila Mphahlele. "Towards Innovative Ways of	<1%