

### 3.1 Introduction

- 3.1.1 The system of educational provision for learners with special needs inherited from the apartheid era is clearly both inefficient and inequitable. Its inefficiency is reflected, firstly, in the maldistribution of learners, with three provinces (Gauteng, Western Cape and KwaZulu-Natal) having 236 of the 380 special schools (62%) and 65% of learners. Given the centralisation during apartheid, learners from all over the country were required to attend schools in these provinces depending on the nature of their needs. However, it is evident that educational provision in the other provinces has also not been cost-effective. For instance, in the North West province 42 schools cater for just over 4, 000 learners, a learner:school ratio of 104, while in Gauteng the learner:school ratio is approximately 265.
- 3.1.2 Secondly, individual learner costs of provision by province vary widely from R11,000 a year in Gauteng to R23,000 in the Free State and R28,600 in the Western Cape. These discrepancies are due largely to the racial organisation of special schools, with schools for whites most highly resourced. Additionally, these variances probably also reflect other inefficiencies in provision.
- 3.1.3 The system has been historically iniquitous because the focus of provision has been on the white population and remains inadequate for the black population, particularly for Africans in rural areas and small towns. As stated earlier, the segregation of learners on the basis of race was extended to incorporate segregation on the basis of disability. The challenge therefore is to transform the current system to make it more efficient, more equitable and more just.
- 3.1.4 The policy proposals described in the White Paper are aimed at developing an inclusive education and training system that will ensure that educational provision for learners with special needs is largely integrated over time into what are currently considered to be 'ordinary schools'.

## 3.2 Critical Success Factors

- 3.2.1 The development of the inclusive education and training system, and in particular, the development of appropriate funding strategies, must take account of various factors that will impact on the nature of, and the extent to which such a system can be developed. Foremost amongst these factors are human resource, fiscal and institutional capacities.
- 3.2.2 The high, although improving learner:educator ratios are putting a considerable burden on all professionals in the education system, both in teaching and management. Expanding access and provision to disabled children and youth of school-going age that are currently out of school implies a steep increase in demands placed on these professionals. Given current financial capacity (see below), as well as the inability of the education system to produce adequate numbers of such individuals in the short term, progress towards the inclusive education and training system will be dependent heavily on more effective usage of current skills in the 'special needs' sector. This is a fundamental proposition of the White Paper.
- 3.2.3 In the context of the current low growth rate of the South African economy and the relatively large slice of the budget that is allocated to education in nominal terms, it is unlikely that significantly more public resources in real terms will be allocated to the sector in the next few years.
- 3.2.4 The policies outlined in this White Paper will lead to the more cost-effective usage of resources in the long term when the proposed model is fully operational. However, in the short-term it is clear that additional funding will be required for 'special needs' education - such funding will have to be sought from a range of sources, in particular the provincial education budgets and donor funding, both local and international.
- 3.2.5 Since provincial governments will have responsibility for the implementation of most of the policies outlined in this White Paper, it will be important to note that provincial governments have only now recovered from considerable over-expenditure in 1997/98 in the social services sector. While over-expenditure during this period in education, in particular on personnel costs and a net increase in pupil enrolment, dramatically reduced expenditure on critical programmes such as special education, early childhood development and adult basic education and training, better financial planning and management have now produced credible budgets and expenditure patterns. The confident but progressive establishment of an inclusive education and training system as outlined in this White Paper must therefore also be understood against this background.

- 3.2.6 The White Paper recognises the continued existence of these fiscal realities and capacities and thus proposes a realistic time frame of 20 years for the attainment of the inclusive education and training system.
- 3.2.7 However, it is important that the limited financial resources available for the education and training of individuals with barriers to learning are targeted to those with the greatest need. Thus, some degree of targeting on the basis of poverty/income/socio-economic status will be required.
- 3.2.8 A third set of factors critical to the success of the proposed system relates to the development of appropriate institutional structures for delivery. The current system of provision is both cost-ineffective and excludes individuals with barriers to learning from the mainstream of educational provision. The White Paper proposes a mix of institutional structures of district support systems incorporating special schools as resource centres and full-service schools to meet the challenges of provision within an inclusive system. The costs of implementing such a system of institutional structures, especially in the transitional phase, will need to be investigated.

### 3.3 Current Expenditure Patterns

- 3.3.1 In the fiscal year 2000/01 just under three percent (2.82%) of the total education budget, or approximately R1.25 billion, was allocated to special schools. This figure was slightly down from 1999/2000 (2.85%) and is projected to remain constant for the next two years of the MTEF cycle.
- 3.3.2 In 2000/01, provincial expenditure on special schools was projected to vary from a low of 1.49% in North West to a high of 6.98% in the Western Cape.

### 3.4 Expanding Access and Provision

- 3.4.1 It is estimated that during the apartheid era, only about 20 percent of learners with disabilities were accommodated in special schools. As stated earlier, approximately 280,000 learners are unaccounted for in the system. It is likely that some of them are in mainstream schooling where their needs are not being catered for. However, the majority of them are probably not in the schooling system at all. The mobilisation of these out-of-school children and youth represents one of the big challenges in the development of the inclusive education and training system.

3.4.2 Expanding access and provision on this scale implies a need for considerable resources, particularly staffing. At the current average staffing ratios in special schools of around 1:10 (ranging from 1:6 to 1:16), expanding the system on the conventional model will be impossible. However, it is expected that in an inclusive education and training system, as the majority of individuals with barriers to learning are integrated into 'full-service' schools so as to achieve a 'natural' geographical distribution of such learners as opposed to the current distorted pattern resulting from apartheid, a more efficient system will result with respect to the usage of both limited financial resources and specialist staff. When schools are fully inclusive, a situation should ensue that on average, a school's population will comprise no more than a small percentage of individuals with special education needs. Given these small absolute numbers of learners in a school, it makes sense for specialist educators not to be based at each school, but as the White Paper outlines, at the district level to be drawn upon by each school as required.

### 3.5 Costs Attached to Expanding Access and Provision

3.5.1 A large proportion of the additional costs in the short to medium term relates to:

- Providing for the approximately 280,000 children and youth not in the education system; and
- converting primary schools (and later, secondary schools and colleges) to full-service schools, eventually at least one such school in each school district in the country.

3.5.2 Both of the above have funding implications relating to the provision of necessary physical and material resources, as well as staff and requisite professional development. In addition, in respect of the recruitment of out-of-school learners, sustained information, advocacy and mobilisation will need to be undertaken.

### 3.6 Funding Strategy

3.6.1 As stated earlier, the inclusive education and training system will include a range of different institutions, including special schools/resource centres and designated full-service and other schools, public adult learning centres and further and higher education and training institutions. The vision and goals articulated in this White Paper reflect a 20-year developmental perspective.

- 3.6.2 For the short to medium term, that is the first five years, a three-pronged approach to funding is proposed, with new conditional grants from the national government, funding from the line budgets of provincial education departments and donor funds constituting the chief sources of funding.
- 3.6.3 A funding approach that separates personnel and non-personnel resources will be adopted. The generation and distribution of personnel resources will be determined through the post-provisioning process, while the School Funding Norms will govern the generation and distribution of non-personnel resources.

### 3.7 Conditional Grants

- 3.7.1 New conditional grant funding from the national Government is proposed for non-personnel funding for the first five years. In particular, such funding will be used for two purposes. Firstly, it will be used in both special and full-service schools to provide the necessary facilities and other material resources needed to increase access for those currently excluded. Secondly, it will be used to provide some of the non-educational resources that will be required to ensure access to the curriculum, such as medication, devices such as wheelchairs, crutches, hearing aids, guide dogs, interpreters and voice-activated computers, and social workers.
- 3.7.2 Further investigation will be undertaken by the Ministry regarding the magnitude of these expenditures and how they can be phased in over the next five-year period.

### 3.8 Budgets of the Provincial Education Departments

- 3.8.1 The budgets of provincial education departments will need to be reviewed and reformulated to meet some of the needs of the proposed inclusive education and training system.
- 3.8.2 The audit of programmes offered by existing special schools will help inform the development of a spectrum of programme costs varying from cheapest to most expensive.
- 3.8.3 In respect of staffing, the objective of the post-provisioning strategy is to allocate posts in accordance with the actual educational support needs of the learners concerned and not, as is the case currently, on the basis of category of disability. The revised resourcing model will create a dedicated pool of posts for the educational support system.

- 3.8.4 The achievement of this objective necessitates a revision of the current post-establishment model. Such a revision will focus on the development of an appropriate post-distribution mechanism, guidelines for post utilisation and structural and organisational arrangements to ensure flexibility in the deployment of posts. Particular attention will be given to optimising the expertise of specialist support personnel, such as therapists, psychologists, remedial educators and health professionals.
- 3.8.5 Teaching posts will be allocated to all schools in terms of the existing post-distribution model. In filling these posts, school management is obliged to ensure that the learners who 'generated' the posts are adequately catered for through appropriate and effective educational programmes.
- 3.8.6 A pool of posts for the district support teams and special schools/resource centres to provide support to schools will be created in terms of a formula related to the differing levels of programme costs. These posts will be top-sliced from the total pool of posts in a province before the post-distribution model is applied to schools.
- 3.8.7 These posts, together with those traditionally allocated to provincial education support services, will thus form a pool of specialists with appropriate expertise and experience. Posts will therefore be utilised for the deployment of resource persons that can provide direct interventionist programmes to learners in a range of settings, and/or serve as 'consultant-mentors' to school management teams, classroom educators and school governing bodies.
- 3.8.8 It should be emphasised that no real increase in the fiscal envelope is envisaged in this staffing strategy in the short to medium term. What is being proposed here is a much more cost-effective use of specialist educators than is currently the practice.

### 3.9 Donor Funding

- 3.9.1 Donor funding will be mobilised for short-term activities. Two such activities are described in the White Paper:
- The audit of existing state special schools, as well as independent special schools; and
  - the national information, advocacy and mobilisation campaign to expand access to those previously excluded.

## 3.10 Further Education and Training and Higher Education

- 3.10.1 With regard to further education and training, the Ministry will undertake a study to determine the costs attached to the establishment of full-service further education and training colleges that mirror the general education sector. As stated earlier, the Ministry will link the learning of individuals with disabilities stemming from impaired intellectual development and who do not require intensive support to the general restructuring of the further education and training sector currently being undertaken by the Department. The funding arrangements for these full-service colleges will, therefore, constitute a sub-set of the broader funding strategy for the further education and training sector.
- 3.10.2 The National Plan for Higher Education requires higher education institutions to increase the participation of learners with special education needs. The Ministry, therefore, expects institutions to indicate in their institutional plans the strategies and steps, with related time frames, they intend taking to increase enrolment of these learners. The Ministry will also make recommendations to higher education institutions regarding minimum levels of provision for learners with special needs. However, all higher education institutions will be required to ensure that there is appropriate physical access for physically disabled learners. It will not be possible to provide relatively expensive equipment and other resources, particularly for blind and deaf students, at all higher education institutions. Such facilities will therefore have to be organised on a regional basis.

## 3.11 The Time Frame

- 3.11.1 As stated earlier, a realistic time frame of 20 years is proposed for the implementation of the inclusive education and training system. This implementation plan can be broken down as follows:
- **Immediate to short-term steps (2001-2003). The necessary steps will include:**
    - a) Implementing a national advocacy and education programme on inclusive education.
    - b) Planning and implementing a targeted outreach programme, beginning in Government's rural and urban development nodes, to mobilise disabled out-of-school children and youth.
    - c) Completing the audit of special schools and implementing a programme to improve efficiency and quality.
    - d) Designating, planning and implementing the conversion of 30 special schools to special schools/resource centres in 30 designated school districts.

- e) Designating, planning and implementing the conversion of thirty primary schools to full service schools in the same thirty districts as (d) above.
  - f) Designating, planning and implementing the district support teams in the same 30 districts as (d) above.
  - g) Within all other public education institutions, on a progressive basis, the general orientation and introduction of management, governing bodies and professional staff to the inclusion model.
  - h) Within primary schooling, on a progressive basis, the establishment of systems and procedures for the early identification and addressing of barriers to learning in the Foundation Phase (Grades R-3).
- **Medium-term steps (2004-2008). The major steps will include:**
    - i) Transforming further education and training and higher education institutions to recognise and address the diverse range of learning needs of learners, especially disabled learners.
    - j) Expanding the targeted community outreach programme in (b) from the base of Government's rural and urban development nodes to mobilise disabled out-of-school children and youth in line with available resources.
    - k) Expanding the number of special schools/resource centres, full-service schools and district support teams in (d), (e) and (f) in line with lessons learnt and available resources.
  - **Long-term steps (2009-2021):**
    - l) Expanding provision to reach the target of 380 special schools/resource centres, 500 full-service schools and colleges and district support teams and the 280,000 out-of-school children and youth.

### 3.12 Summary

- 3.12.1 The funding strategy that is proposed in this White Paper is a realistic one that takes into account the country's fiscal realities. The important features of this strategy are its emphasis on cost-effectiveness and exploiting the economies of scale that result from expanding access and provision within an inclusive education and training system.
- 3.12.2 For the short to medium term, that is the first eight years, a three-pronged approach to funding is proposed, with new conditional grants from the Government, funding from the line budgets of provincial education departments and donor funds constituting the chief sources of funding.

3.12.3 Further investigations will be undertaken by the Ministry regarding the magnitude of these expenditures and how they can be phased in over the five-year period.

3.12.4 In order to develop a feasible implementation plan for the envisaged 20-year period, a number of research tasks will need to be undertaken. Such research will inform the development of the implementation plan, particularly in respect of the financial, human resource and institutional constraints identified earlier. Research will include the following:

- Costing of an ideal district support team.
- Costing the conversion of special schools to special schools/resource centres.
- Costing of an ideal full-service school.
- Costing of a 'full service' technical college.
- Determining the minimum levels of provision for learners with special needs for all higher education institutions.
- Devising a personnel plan.
- Costing non-personnel expenditure requirements.