



basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA

INTERIM FUNDING PRINCIPLES FOR INCLUSIVE EDUCATION

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1 Background

There is an urgent need to put funding of support for learners with disabilities and those experiencing barriers to learning, on a more sound and adequate footing while the full strategy on inclusive education is being finalised. Learner needs may be met in a variety of ways in different settings which include special schools, full service schools and ordinary schools with support being made available to all these institutions through district-based teams.

This flows from the situation that we currently fail to provide sufficient access to quality basic education to learners with disabilities. Sufficient appropriate school places are not available to disabled learners representing a failure in fulfilling our Constitutional mandate to guarantee access to quality basic education to all children. It is also wasteful as it leads to a failure to equip a substantial number of our children with skills to be fully integrated into society and contribute productively to the economy. It leads to considerable unnecessary burdens and economic pressures on parents and society.

Issues that therefore need to be addressed are:

- The lack of adequate and appropriate support for learners with disabilities within mainstream and special school settings (inadequate “school places”).
- The inadequate funding of support for schools which include learners with disabilities and the inequality of funding between schools within provinces and between provinces (inadequate and unequal funding of current “places”).

2 The Policy Approach

The starting point is that all children with disabilities should be accommodated within their local mainstream schools, including where necessary in terms of their level of support needs, within local special schools. The emphasis should be on providing choices to learners and putting in place appropriate support in the different school types, namely special, full service and mainstream schools.

Given the right support in ordinary schools, children with certain levels of need and intensities of disability can be accommodated in ordinary schools. This will reduce in a responsible way the cost of their education (as compared to accommodating all in special schools) and also fulfils an important function in assisting in full integration of these children in society.

It is therefore envisaged that, depending on level of intensity of educational support needed to minimise the impact of their disability, disabled children will be accommodated in the education system as follows:

- Learners with the most intense level of support needs (Level 5) will continue to be entitled to be accommodated in special schools or specialised sites if it is their choice. This will require an increase in the number of sites in almost all provinces where such specialised support will be available on a full time basis and increasing funding to some of the existing special schools as well as to the wider range of such sites for specialised support¹. Recognising the fact that the special schools will also serve the double function of being a resource centre to full service and mainstream schools, additional funding will also have to be made available to fulfil this new role.
- Learners with less intense levels of support needs (Level 4) can be accommodated in full service schools which are public ordinary schools that are provided with extra personnel, infrastructure and non-personnel non-capital resources to accommodate a certain number of learners from the local neighbourhood who require specialised support (especially those who experience impaired mobility or need specialised devices) as well as provide indirect support to all the surrounding schools that will also accommodate learners with disabilities. This will require a significant increase in the funding of schools that are designated as full service schools.
- Other disabled learners (levels 1-3 as well as level 4) who require less specialised support and will elect to go to mainstream schools – these children will benefit from the general increasing trend in the resourcing of public ordinary schools as well as from enhanced district-based support teams that will be responsible to plan and monitor support services within each district at ordinary, full-service as well as special schools. The model will be strongly based on two key principles of Education White Paper 6, namely:
 - a move away from category of disability to level of support needed as an organiser
 - favouring availability of support programmes rather than placement or movement of learners.

3 The Funding Approach

Learners with disabilities require additional resourcing in order to provide them with access to a basic education. For this reason, special funding principles will be applied to ensure that the requisite support is available in special schools, full service schools and mainstream schools. In essence they will receive additional personnel, capital and NPNC funding to ensure that they can achieve educationally.

Full service schools:

- It is uncertain how many learners are at Level 4 of intensity. If these equal about 0.5% of the population of school-going age, places for nearly 60,000 learners have to be created. This would require between about 1,500 to 2,000 public ordinary schools (out of a total of 27,000) being designated as full service schools, each accommodating about 35 Level 4 learners.
- Full services schools should be provided with

¹ Specialised sites could be ordinary or full-service schools supplied with resource rooms or specialised units or ordinary classes with additional staff (e.g. educational interpreters, class aids or facilitators)

- **Additional teachers** and staff (For each 12 Level 4 learners, 1 additional support teacher or staff) to be part of the team who will be responsible for the support to learners with special needs which is coordinated through an Institutional Level Support Team. These support staff will provide teaching and learning support at the school rather than necessarily working with individual learners – the roles of such teachers and support personnel (including other types of staff such as education interpreters and teacher assistants) will be clearly outlined within the new approach towards support. Given the need to create 60,000 places, this will translate into nearly 5,000 extra posts at an estimated average cost of R150,000. This requires an additional R743 million. In most cases budgets will have to be made available for training of these teachers.)
- **A once-off allocation to enable full service schools to purchase required equipment and to undertake minor refurbishments to accommodate special needs learners.** (An initial estimate is that between R5,000 to R15,000 per learner could be required. In the attached examples an amount of R8,333 per learner was used for a total cost in the first year of implementation of R495 million.)
- In addition to the target **per learner amount for quintile 1 schools (R775), disabled learners in full service schools will receive an ongoing annual allocation for equipment and other special needs** (An initial estimate could be between R1,500 to R3,000 per learner. At an additional cost of R1,667 per learner plus the quintile 1 allocation, this will cost about R145 million per year.)
- In certain cases, a **once-off capital allocation** to put certain infrastructure facilities in place. To determine this amount, minimum facilities standards for full service schools will have to be finalised – field tests have developed resource requirements.
- In order to support and monitor full service schools, **provincial education departments will require additional staff to be part of the District-Based Support Team.** (If one provincial staff member is required for every 30 full service schools (or about 1 per 540 level 4 learners) an additional 45 posts are required at a cost of R27.5 million per year.)
- Further analysis of empirical costs will have to determine whether additional allocations will be required for **hostel and transport cost**

Given the values above, full implementation of full service schools in one year will cost R1.3 billion in the first year and R915 million per year thereafter (ignoring inflation).

Special Schools:

Special schools will eventually only accept learners with level 5 intensity of support needs. As for full service schools, it is difficult to estimate the demand for special school/specialised settings places (number of learners at level 5) and again a rough estimate of 0.5% of the population of school going age has been utilised – approximately 60,000 places. At an average school size of about 100 learners this would require 600 special schools. In keeping with the approach of Education White Paper 6, there should be a greater shift towards providing access in neighbourhood schools, even for learners with level 5 support needs, provided measures can be put in place for their support. At least, these places need to be created rather at full-service schools than at large scale special institutions where learners are removed for long periods of time from their families and communities.

- Special Schools should be provided with

- **Additional teachers** (A possible learner:teacher ratio at special schools is 5:1. This would translate into about 12,000 posts at a cost of R1.8 billion per year.)
 - **A non-teaching support complement at schools.** (For illustrative purposes a ratio of 20 children to 1 support staff has been used, implying a potential cost of R446 million)
 - In addition to the target **per learner amount for quintile 1 schools (R775), disabled learners in special schools will receive an ongoing annual allocation for equipment and other special needs** (An initial estimate could be between R25,000 per learner. This would cost R1.5 billion per year).
 - Hostel and transport cost. (If it is assumed that on average 1 out of 50 learners require a hostel place at an annual cost of R40,000, this translates into nearly R50 million per year.)
- Given the inadequate number of special schools and resource centres for support to full service and mainstream schools and the skewed distribution of the available schools, new special schools/resource centres settings will have to be established. A potential five new centres/shools per year at an average cost of R35 million per school will require R175 million per year of.

Given the illustrative numbers above, full implementation of the scenario (excluding capital costs) will require R3.8 billion per year.

District-based support teams and support to mainstream schools

The staff in the DBST's will be specialised in addressing barriers to learning and development in ordinary, full-service and special schools/resource centres, e.g. through:

- Identification of levels of support needed in all schools in the district by conducting audits on the basis of the indicators for extrinsic or systemic barriers
- Setting in place and implementing systems for the identification of levels of needs of individual learners with high intrinsic needs
- Training **institution-level support teams** on the broad and specific principles and approaches to addressing barriers to learning and development - focusing to a large extent on curriculum delivery for diverse learner needs
- Assisting educators in specific interventions for individual learners with high support needs (itinerant staff of the DBST)
- Providing direct support to learners in terms of specialised interventions
- Monitoring whether support funding measures are being appropriately applied at sites of learning
- Co-ordinating the services of the extended network of support staff comprising the newly established District Support Teams, e.g. staff from resource schools, full service schools, social and health officials, etc.

District-based Support Teams should be provided with:

Additional staff to ensure the full capacity of multi-disciplinary teams which focus on basically four areas of support, namely Teaching and Learning Support, Institutional/Whole School Support, Systems/Administrative Support and Psycho-Social and Health Support. (See ratios in the draft personnel plan)

In order to provide a holistic service to schools to enable them to effectively implement supportive and inclusive teaching and learning environments, existing staff working in districts will have to take on inclusion responsibilities, especially circuit managers and curriculum advisors.

When it comes to support learners with high and very high needs (essentially learners with disabilities), dedicated specialised staff will have to be appointed at the district level to ensure that there is at least one multi-disciplinary team for each 50/100? Schools (e.g. therapists, psychologists, social workers, etc.)

In districts where there are no or few specialised support staff attached to existing special schools, a substantial number of posts will have to be created to address the needs of such a district, especially as these districts generally fall in poor and under-resourced areas of the country where children with disabilities have been most neglected. In districts, where there are many special schools, their specialised staff can be appointed at the district level so as to provide specialised services in as well as beyond the special schools.

The Districts will also have to make provision for **transport** for itinerant teams working in schools.

In many cases, districts will have to take responsibility for establishing a resource centre from where **assistive devices, specialised equipment and Teaching and Learning Materials** can be provided to schools and learners. This would especially be the case in districts where schools do not yet have secure facilities.

In certain cases, a **once-off capital allocation** to put infra-structure facilities in place, especially in areas where such services have not previously been available.

Ordinary Schools

Additional staff will have to be made available for each 12 learners with high needs who are admitted to an ordinary school

Further General Principles and Issues

- Given the costs involved as well as capacity constraints with regard to personnel, infrastructure and procuring other inputs, a phased approach will have to be taken. In the scenarios utilised here it would mean scaling down the number of school places to be provided in initial years.
- The above costs will not all be new costs as existing spending on special schools has to be taken into account.
- Implementation must move jointly on special schools, full service schools and support to mainstream schools as increased funding at only one point in the continuum of options for learners with special support needs will lead to a flooding of learners to potentially inappropriate but more generously funded options.
- Special schools and full services schools should be allowed to work closely with the District-based Support Teams to pursue the teaching of disabled learners as effectively as they can with the emphasis on retaining children at their local neighbourhood schools. This should apply both to decisions about admissions, appropriate teaching and the utilisation of funding, making support programmes available on an outreach basis. These schools should therefore all be S21 schools.

- If a proper screening system is not in place, funding changes cannot be implemented as it will lead to a huge flow of inappropriate learners to the better resourced sector, making the policy completely unaffordable. This process must however centrally involve parents and teachers and emphasise access to support rather than placement.
- Initially places in special schools and full service schools will have to be rationed. Intensity of need seems to be the appropriate criteria for such rationing.
- A decision needs to be made whether there should be poverty targeting of spending both through distribution of places that are made available and through means testing for fee paying ability.

Way forward

Substantial work has been done recently through audits and field tests to determine the status quo in terms of support as well as to determine appropriate types and levels of support. This must be utilised to do forward planning.

The principle needs to be accepted that a major and fairly costly drive is necessary to ensure access to basic education for learners with disabilities in categories 4 and 5.

From the funding side it needs to be accepted that special schools and full service schools require additional personnel, non-personnel non-capital and capital resource and that providing support in mainstream and full service schools will require building of district-based support teams.

Increased resourcing can be done either through a per capita subsidy or by estimating required learner: personnel ratios and separate cost estimates for capital spending and non-personnel recurrent costs.

An analysis of actual practice and expenditure at a range of special schools will have to inform refinement of the key ratios and cost assumptions above. This will inform revised proposals to the education sector and a final budget bid by June 2007. Such estimates will also have to be tempered by implementation capacity and especially the availability of human resources. Implementation planning must therefore proceed in tandem with more detailed costing and improved estimates of the demand for places in special and full service schools and implementation planning for district based support teams. All this has to inform detailed plans around establishment of district-based support teams, full service schools and the building of new specialised resource centres/schools.

Implementation of the screening tool will have to be accelerated to ensure screening for 2008 between July and September 2007.

Norms and standards for facilities and infrastructure at full service schools have to be finalised in order to start costing of infrastructure requirements as a matter of urgency