



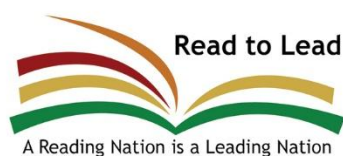
SCHOOL GOVERNING BODY FUNCTIONALITY TOOL

School Calendar 2026



basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA



SGB Functionality Tool

1. The South African Schools Act No 84 of 1996 (SASA) 'as amended' stipulates that the governance of a school is vested in its School Governing Body (SGB).
2. SASA provides for roles and responsibilities that SGBs must perform.
3. The SGB Functionality Tool selects key categories from the expected roles for SGBs to self-evaluate their performance and for the Department to assess their functionality to determine areas of support and capacity building. The Tool further indicates of the functionality level of the SGB based on the categories assessed.
4. Each category contains four statements. Only **ONE** must be selected, as the statements are arranged in a cascading order where a higher ranking (with evidence) presupposes that the lower criteria have been achieved. Therefore, only one block must be marked with an X per category.
5. Schools must meet **ALL** the criteria to get a specific score.
6. The tool must be completed using the two (2) attached checklists.
7. The School Principal and an SGB representative should administer the first rating followed by the moderation by a Departmental official based on the evidence provided by the school.
8. Both the school and departmental representative must sign the tool.
9. The Department of Basic Education or Provincial Education Department will select a sample of schools from those rated for verification purposes.

2026

2026 SCHOOL GOVERNING BODY FUNCTIONALITY TOOL

Name of School: _____ EMIS: _____ Province: _____ District: _____

A Fee Paying: YES/No Quintile _____ Type of School: Urban _____ Rural _____ Township _____ Farm School _____

Category	Rating by the school				Moderated rating by official	Recommendation/Comment document by the district official	per
	Mark with an X	Mark with an X	Mark with an X	Mark with an X			
1. SGB Constitution	0 Not available	1 Available, consulted with all members. (Provide evidence)	2 Available, consulted with all other stakeholders and in line with relevant legislation	3 The SGB constitution is formally submitted to HOD within 90 days, accompanied by proof of submission and evidence that the constitution is being used to guide governance processes (e.g. referenced in meetings or governance decisions). (Provide evidence)			
2. School mission statement	0 Not available	1 Available, consulted with all members.	2 Available, consulted with all other stakeholders and in line with relevant legislation. (Provide evidence)	3 The mission statement is actively guiding school practices, is aligned to legislative and policy frameworks, and is communicated and referenced in school planning documents (e.g. SIP, policies, school communications). (Provide evidence)			

3. Admission Policy	0 Not available	1 Available, consulted with all members. (Provide evidence)	2 Consulted with all other stakeholders, in line with relevant legislation, reviewed and adopted to ensure alignment with the amended SASA provisions and provincial admission regulations	3 The school implements the admission policy by submitting admission reports and placement challenges timeously to the district. Policy compliant with amended SASA provisions. (Provide evidence)		
4. Language Policy	0 Not available	1 Available, consulted with all members. (Provide evidence)	2 Consulted with all other stakeholders, in line with relevant legislation, reviewed and adopted to ensure alignment with the amended SASA provisions	3 The school has implemented the language policy with evidence in their curriculum provisioning and admission decisions reflect the revised policy.		
5. Religious Observances Policy	0 Not available	1 Available, consulted with all members	2 Available, consulted with all other stakeholders, and in line with relevant legislation (Provide evidence)	3 The policy is implemented in school activities, ensuring inclusivity and compliance, with evidence such as programmes, circulars, or schedules reflecting lawful religious observances.		

Category	Rating by the school					Moderated rating by official	Recommendation/Comment per document by the district official
	Mark with an X	Mark with an X	Mark with an X	Mark with an X			
6. Code of Conduct for Learners	0 Not Available	1 Available, consulted with all members	2 Available, consulted with all other stakeholders, and in line with relevant legislation, reviewed and adopted to ensure	3 The Code of Conduct is applied consistently, including disciplinary processes aligned to amended SASA and other legislation, with records of implementation			

			alignment with the amended SASA provisions (Provide evidence)	(disciplinary hearings, learner support interventions).		
7. SGB correctly constituted	0 Not in place	1 In place and list showing full names and contact details of all SGB members available (Provide evidence)	2 In place and list showing full names and contact details of all SGB members available and all electable categories filled. (Provide evidence)	3 Plans in place for closing vacancies. All Secondary schools have RCL members in SGB. Each Parent linked to a learner in line with definition of a parent (Provide evidence)		
8. Office-Bearers	0 Not in place	1 In place	2 In place and elected in 2026 following the correct election process and all electable categories of office bearers filled (provide evidence) (provide minutes)	3 Office-bearers are fully constituted, trained, and have completed handover processes, with evidence of role execution (e.g. chairperson leading meetings, treasurer overseeing finances). (Provide evidence)		
9. SGB Meetings	0 Not in place	1 Schedule of meetings is in place (Provide evidence)	2 Schedule of meetings is in place, meetings conducted (Provide evidence)	3 Meetings are held as scheduled and resolutions are implemented, with action plans monitored and followed up, evidenced through progress reports and subsequent minutes. (Provide evidence)		
10. Finance Policy	0 Not Available	1 Available	2 Available, compliant with the amended sections and consulted with internal stakeholders	3 The Finance Policy responds to the what, how and when of procurement. Compliant with the amended sections dealing with procurement, reporting		

			(Provide evidence)	mismanagement and transparency measures implemented in line with amended SASA.		
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Category	Rating by the school					Moderated rating by official	Recommendation/Comment per document by the district official
	Mark with an X	Mark with an X	Mark with an X	Mark with an X			
11. Finance Committee	0 Not in place	1 In place with the treasurer as the chairperson	2 In place and meetings held monthly (Provide evidence)	3 In place, regular meetings held and school finances managed in terms of compliance with policy and amended SASA provisions including oversight of expenditure, and reporting to the SGB. (Provide evidence)			
12. School Budget	0 Not Available	1 Available	2 Budget available and is prepared following acceptable protocols (Provide evidence)	3 Budget available, prepared following acceptable protocols, used to guide expenditure. Annual General Meeting/Budget meeting held and budget approved by parents, quorum requirements are met, deviations/non deviations are recorded (Provide			

				evidence)		
13. Financial Records	0 Financial records are not available	1 Financial records are drawn, reported quarterly and presented to parents	2 Financial records are drawn, reported, tabled, approved and submitted to the district, audited financial statements to the HOD as legally required (Provide evidence)	3 Financial records are properly maintained, approved, and submitted to the district, with evidence of oversight and compliance timelines being met. Quarterly reports discussed in SGB meeting. (Provide evidence)		
14. Learner Support Material	0 Orders prepared	1 All internal stakeholders participated (Provide evidence)	2 All internal stakeholders participated and approved by the SGB. (Provide evidence)	3 All internal stakeholders participated, approved by the SGB and LSM processes result in orders being placed and delivered, aligned to curriculum needs, with evidence that materials are received and utilised by the school. (Provide evidence)		
15. School property, buildings, and grounds	0 No controls are in place	1 Controls are in place	2 Controls are in place and administered by the SGB (Provide evidence)	3 The SGB implements and monitors control measures, maintains an operational maintenance plan, and ensures that facilities are functional, safe, and properly recorded through regular inspections. (Provide proof)		

<p>16. Safety Policy</p>	<p>0</p> <p>Not available</p>	<p>1</p> <p>Available and consulted with internal stakeholders (Provide evidence)</p>	<p>2</p> <p>Updated Safety Policy is in line with the relevant legislation, reviewed and adopted to ensure alignment with the amended SASA provisions</p>	<p>3</p> <p>The school complies with mandatory reporting requirements, with documented reports of serious incidents submitted to relevant authorities and follow-up actions implemented.</p> <p>(Provide evidence)</p>	<p></p>	<p></p>	<p></p>
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Total rating		Rating by the Principal	Rating by the Education Official
Functionality level		Place x	Place x
2: 29- 48	Meets the minimum criteria of effectiveness		
1: 0- 28	Does not meet the minimum criteria of effectiveness		
Total			
Percentage (%)			

1. NAME OF PRINCIPAL	
SIGNATURE:	
Telephone/Cell no	
DATE:	
2. NAME OF SGB CHAIR	
SIGNATURE:	
Telephone/Cell no	
DATE:	
3. NAME OF EDUCATION OFFICIAL	
SIGNATURE:	
Telephone/Cell no	
DATE:	

Official School Stamp

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