***240731 NPC ADVISORY ON BASIC EDUCATION,******Draft 1 FOR CONSULTATION IN AUGUST 2024 PRIOR TO ADOPTION BY THE NPC***

**EXECUTIVE SUMMARY**

This advisory is written to support the recommendations on Basic Education in the NPC’s MTDP[[1]](#footnote-1). The NPC proposed that the DBE and the PED should prioritise a focus on ***planning to improve literacy[[2]](#footnote-2) and mathematics*** together with the actions that are pre-requisites for creating the necessary conditions to achieve this. This includes addressing ***inequities of resourcing*** that impact on performance, and doing so ***within a rigorous planning framework***[[3]](#footnote-3).

# **INTRODUCTION AND BACKGROUND**

In March 2023, the NPC adopted a stakeholder-informed process to review Chapter 9 of the NDP aiming to identify priority areas which, if attended to, could: accelerate implementation of the overall goals of the NDP; maximise system efficiency in a resource constrained environment; and improve quality in order to improve efficiency and address pervasive inequality.

More rigorous ***planning for and monitoring of actions to improve literacy and mathematics*** is a necessary prerequisite to achieve the goals of the NDP that: ‘the specific focus of Basic Education over the next eighteen years should be on: improving literacy, numeracy/mathematics, and science outcomes, increasing the number of learners eligible to study maths and science-based degrees, improving performance in international comparative studies, and retaining more learners’.

Progress towards these goals is unsatisfactory[[4]](#footnote-4). Improving literacy and mathematics from the foundation years would significantly accelerate progress by addressing the **systemic inefficiencies** seen in high levels of failure and repetition and in the multiple long-term personal and systemic consequences of poor foundations on subsequent maths and science performance, and retention.

Progress should be pursued within a deliberative focus on **improved planning** to **reduce inequities** in ‘inputs’ in order to achieve greater **quality** and more **equitable** outcomes. Evidence-informed planning that is aligned with resourcing across clear time-frames, which monitors and reports on both implementation and progress against agreed indicators, and informs timeous corrective action is needed nationally and provincially.

# **PROCESS OF DEVELOPING THIS ADVISORY**

# **Key Stakeholders**

A range of stakeholders were consulted. Key themes raised in written submissions included concerns regarding perceived deficiencies in the quality of Basic Education, specifically in literacy and language, and maths and science, and the need for increased orientation to building professionalism in accountability systems.

On-line meetings were held with all professional associations/unions of Teachers[[5]](#footnote-5), the National Association of Changes Agents in Education, the South African Principals’ Association, and the Independent Philanthropy Association of South Africa. The teacher unions requested the inclusion of teacher development and initial professional education of teachers as focus areas. Teacher development is now a major focus, and a separate advisory will follow on initial teacher education. Several points of consensus emerged:

* The system’s primary focus and imbalanced expenditure on the National Senior Certificate (NSC) is ‘too little too late’. The NSC results are seen to be the primary focus of the department, rather than the quality of education throughout the system and particularly the early years.
* The NDP goals of improving literacy, mathematics and science are critical and require more teacher support and provision of appropriate resources.
* A range of concerns were expressed about planning and monitoring processes. Policies are created with no implementation plans, specifications of targets, or meaningful monitoring of outcomes.
* This affects reporting between schools and districts characterised as malicious compliance with little value, overloading schools with tick-box micro-management, and without substantial professional engagement on issues of quality. ‘Knowledgeable guidance’ would be more useful than ‘authoritarian command’ with inadequate information flows.

Additional issues raised included a growing tendency to ‘out-source’ work which should be done in the DBE further diminishing the capacity of the DBE.

In December 2023, a meeting was held with all teacher unions to discuss the strategies to be proposed, and there has been consultation with all the above stakeholder groups on this advisory in August 2024[[6]](#footnote-6).

# **Consultation with the Department of Basic Education**

The NPC is grateful to the DBE for its support for this process. The DG established a Working Group to liaise with the NPC which suggested key areas for the advisory and facilitated ongoing interaction including with relevant DDG and Chief Directors. In 2023, the DG arranged for presentations on the process and proposed content of the NPC Basic Education advisory to the Heads of Education Committee (HEDCOM), the DBE Broad Management Team, and the Council of Education Ministers (CEM). The final draft of the working papers were shared with the DBE, and a final draft of this advisory was[[7]](#footnote-7) presented for comment at HEDCOM and CEM in August 2024.

# **Papers Commissioned and Working Groups Established**

The NPC is grateful to the academics and practitioners who contributed by writing concept documents, participating in working groups in which these were discussed, and being critical readers of final drafts of the working papers, and of this advisory. This advisory has drawn deeply from this work and robust discussions in the meetings and in drafting[[8]](#footnote-8).

# **PROBLEM STATEMENTS[[9]](#footnote-9)**

# While performance in literacy and mathematics shows some improvement in international assessments, since the discontinuation of Annual National Assessments in 2015, there are no national measures to monitor national progress and performance against NDP targets to guide the work of officials and schools[[10]](#footnote-10). The results of the DBE’s systemic evaluation of 2021 are anticipated in 2024 and will only then provide national and provincial[[11]](#footnote-11) baselines against which to measure progress.

# The absence of the key conditions necessary for effective teaching and learning of literacy and mathematics in schools correlates with both the socio-economic status of the school (for which the quintile system is used as a proxy) and with the educational resource base of the province. These resourcing inequities drive the unequal conditions of teaching and learning under which unequal outcomes are the inevitable consequence[[12]](#footnote-12).

# In addition to the severe material resource constraints under which teachers work, the system to support teachers is operating sub-optimally. Firstly, curriculum advisers (whose labour-relations-agreed job descriptions include providing teacher support) operate in crippling low ratios of adviser: school support which are significantly below the recommendations of gazetted DBE policy. Secondly, the policy for Continuing Professional Teacher Development (CPTD) adopted in 2011 has not yet been effectively implemented and teachers do not have access to the CPTD opportunities imagined in the policy because none of the component parts are operating as intended.[[13]](#footnote-13) This absence of opportunity means that the average hours spent by teachers on professional development is only 54% of the hours required by collective agreements[[14]](#footnote-14). These conditions will not improve without more effective planning and better use of data across cross-department and intra-department silos.

# The NPC’s 2023 *Review of the NDP* indicated that the planning system is ‘disjointed, poorly implemented and misaligned to the strategic goals of the NDP’, and is inadequately ‘aligned across spheres of government, poorly funded, sequenced, and co-ordinated’. DPME[[15]](#footnote-15) and Treasury[[16]](#footnote-16) have identified weaknesses including: poor differentiation between short, medium, and long-term plans; rigidity of planning systems; inappropriate indicators; gaming resulting from a compliance and audit culture; a lack of integration across the three spheres of government; silo effects within education departments being replicated in departmental planning documents; lack of clarity regarding interlinkages and contributions of budgets and activities to overall outcomes; and that ‘long-range trends are not sufficiently reported on and interpreted’. This NPC advisory has additionally identified limited capacity at national and provincial levels in the gathering and use of financial and non-financial data to support the planning process.

# **PROPOSALS**

# **PROPOSAL 1: *Institute an education planning capacity-building programme for national and provincial officials, with clear outcomes, to be implemented in the MTDP period.***

The NPC endorses the following recommendations of the Financial and Fiscal Commission[[17]](#footnote-17) all of which could form part of the substantive work of the programme:

* Analyse the cost drivers of the delivery of education services and spending pressures across provinces to assess the adequacy of basic education spending (including the adequacy of education allocations within the current provincial equitable share formula) and to quantify the impact of budget cuts on the delivery of basic education services.
* Protect the redistributive nature of the basic education funding system in the face of potential basic education budget constraints given that funding cuts to schools is likely to have asymmetric impacts across quintiles, with a greater negative impact on lower quintile schools. This would exacerbate inequities in the system. Quintile 1 to 3 schools must be protected.
* Availability and access to credible, reliable, consistently collected, and easily comparable financial and non-financial data is critical to better understand the impact of government spending and to assess school performance.

The NPC also endorses the planning tasks below (identified by the DBE) and recommends that these be part of the substantive work of the programme:

* Achieving better national-provincial engagement on meeting funding targets.
* Improving tracking of equitable share issues affecting education[[18]](#footnote-18).
* Improving the education evidence base informing each province’s division of revenue.
* Exploring measures of assessing school-level socio-economic context in order to improve the system of funding ‘quintiles’.
* Establishing procedures for monitoring per learner spending by province and district and providing data down to school-level averages.
* Undertaking an evidence-based review of the 80:20 split norm (personnel:non-personnel) to monitor compliance with school funding norms and advance equity by improving pro-poor provisions of post provisioning norms and non-personnel funding norms.
* Quantifying the costs of grade repetition and impacts on equity.
* Exploring the funding of school improvement initiatives within the financing framework.

Products of this capacity-building process could include high level analyses of provincial performance, and identification of challenges developed by, and with, each province. These should be publicly available. A plan for this process should be developed in partnership with DPME and academic institutions. Funds should be allocated for this process in the MTEF and could be donor funded.

The DBE’s conception of identifying funding from the fiscus for interventions aimed specifically at enhancing quality in targeted schools in line with the spirit of the NDP is supported. This is urgent given that the focused priority on improving performance in literacy and mathematics in the early years could be used as partnership funding with the philanthropy sector.

# **PROPOSAL 2: *The education planning capacity-building programme should explicitly build realistic and implementable strategies for every province, disaggregated to district level, to address systemic inequalities in both resource provision and in shortcomings in the opportunities for teacher professional development which undermine performance in literacy and mathematics.***

The above process should pursue the tasks in 4.1 with an explicit focus on planning for literacy and maths at provincial and district level. National strategies should be interpreted through the lens of provincial and district data into implementable plans with the first iteration being available by August 2025 for implementation in the 2026/7 financial year. This process might review indicators for planning and monitoring in key area.

# **PROPOSAL 3: *Provincial and District level development of an immediately implementable set of interventions for the MTDP period aimed at improving literacy and mathematics outcomes.***

Policy-informed plans for improving performance in literacy and mathematics exist at national level, but these are resourced within the realities of provincial budget constraints and operationalised at district level within the available material and human resources. Alignment of indicators for planning would enable provincial and national monitoring of implementation of plans in an iterative process of informing strategy based on the evidence-based realities of existing conditions. These material conditions will determine the scoping and differentiation of prioritised actions possible at national, provincial and district levels in realistic planning time frames determined by these conditions. This needs to be built from district level, and bi-annual reporting of performance against targets should include action taken to address weaknesses identified.

The Table below provides an exemplar of what might be used at district level to plan minimum priority actions to improve literacy and mathematics in Grades R-4 within the district and inform and are informed by provincial budget planning for 2025/6. This table can be extended by districts to include additional grades and material conditions, depending on provincial capacity. All indicators selected should have a research-informed evidence base in improving learner performance which are discussed and adopted by the district[[19]](#footnote-19). Guidelines could be drafted at national levels in consultation with provinces before district planning process for 2025 (and subsequent years) commence in term 4 of the 2024 academic year. These could be aligned, where possible, with DBE’s standardised output indicators to minimise reporting overload.

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| **ENABLING CONDITIONS TO IMPROVE LITERACY AND MATHEMATICS** | |
| **AREA** | **TARGET (all data to be disaggregated by school quintile)** |
| Indicators to monitor progress and segment **teacher support** priorities | Proportion of children in Grades 1- 4 achieving DBE literacy benchmarks[[20]](#footnote-20) (baseline to be established at district level). |
| Oral reading fluency assessments conducted by subject-advisers with Grade 3 learners on SA-SAMS generated samples (baseline to be established at district level). |
| Learning and Teaching Support Material in literacy and mathematics in Grades R-4 | Workbook available to every child in all appropriate languages |
| Reading material available to every child in appropriate languages |
| Take home reading material available to every child. |
| Availability of structured learning material for teachers who would like to use these as a resource to foster professional development. |
| Class size in reading and maths in Grades R-4 | Class-sizes in reading and maths within the District cap (withing PPN realities) |
| Teacher Support (Grades R-4) | # Teachers attending training twice in 2025 (subsequently 2026 etc) on pedagogical support in numeracy content and pedagogy by grade[[21]](#footnote-21), (disaggregated by SACE accredited/ non-SACE accredited). |
| Teachers indicating that the training in maths pedagogy assisted in improving their practice |
| Teachers attending training twice in 2025 (subsequently 2026 etc) on pedagogical support in literacy |
| Teachers indicating that the training in literacy pedagogy in improving their practice |
| Teachers participating in SACE-reported PLC focused on improving literacy/ maths |
| Use of BEEI Education Assistants (EA) | EA support, and are supervised by, teachers in pedagogical practices in small groups such as letter-sound recognition, Group Guided Reading, or using maths manipulables. |

# **CONCLUSION**

The NPC supports the FFC recommendation[[22]](#footnote-22) that the Minister should, in consultation with stakeholders, use a framework to agree on a guide for spending prioritisation in the basic education sector that is underpinned by a socioeconomic rights approach. Section 29 (1) (a) of the Constitution made the right to basic educationimmediately realisable. Court judgements are unequivocal that ‘basic education is intended to promote literacy to enable everyone to understand the society in which they live and to fit well in that modern society. Unlike some of the other socio-economic rights, this right is immediately realisable, and must take preference and be protected[[23]](#footnote-23). Court rulings have affirmed that the content of the right to Basic Education includes provision of teaching and learning material, furniture, transport, and provision for special needs education. Addressing deficits in the material contexts of teaching and learning mathematics is not only a necessity for achieving the goals of the NDP but is a non-negotiable and an urgent constitutional obligation.

“The Constitution and the rights enshrined therein are of paramount importance and should guide the government’s plan of action. While spending requirements will always outweigh available resources, it is important, particularly in a fiscally constrained environment, at the very least, to protect the essential elements associated with the right to basic education. Such prioritisation cannot be afforded in isolation and should encompass reforms and corrective action to eliminate inefficiency in terms of implementation, coordination and other challenges” [[24]](#footnote-24).

1. Submitted to Cabinet in August 2024 [↑](#footnote-ref-1)
2. Literacy includes both reading and writing (with comprehension) [↑](#footnote-ref-2)
3. The detailed evidence for the recommendations made in this advisory are available in Background Papers that contain more detail than is possible in a 5-page advisory. These are available on request: (i) Performance against NDP targets; (ii) Fiscal Constraints and Policy Constraints in Achieving Equity; (iii) Resourcing Inequalities at School Level; (iv) Support to Teachers from Curriculum Specialists (including Subject Advisors); (v) Continuing Professional Teacher Development; (vi) Extending the Use of Home Language as the Medium of Instruction; (vii) The ‘Three Stream’ model; (viii) The Strengthened Curriculum; (ix) Indicators to Monitor progress (x) Repetition and Drop-Out. [↑](#footnote-ref-3)
4. See Background Paper 1. [↑](#footnote-ref-4)
5. South African Democratic Teachers’ Union (SADTU), Suid-Afrikaans Onderwys Unie (SAOU), National Professional Teachers Organisation of South Africa (NAPTOSA), Professional Educators’ Union (PEU), and National Teachers’ Union (NATU) [↑](#footnote-ref-5)
6. In process [↑](#footnote-ref-6)
7. These are scheduled [↑](#footnote-ref-7)
8. The NPC wishes to acknowledge the contribution made by the FEM Education Foundation which funded the time of researchers at RESEP who contributed to the background papers and as critical readers, and the contribution of the Zenex Foundation which supported the costs of Programme Management of developing this and other advisories. [↑](#footnote-ref-8)
9. All data on which these problems statement are based are drawn from DBE documents (see background paper). [↑](#footnote-ref-9)
10. The MTSF 2019-2024 (p. 77) set this outcome: ‘10-year-old learners enrolled in publicly funded schools read for meaning’ with this target for the outcome: ‘a measure of Grade 3 (literacy) performance in the new Systemic Evaluation’, [to} be determined after the first assessment’. [↑](#footnote-ref-10)
11. It is unclear if the sample size of 3 000 will provide a valid baseline at provincial level. [↑](#footnote-ref-11)
12. Including e.g.: class size; availability of learning and teaching support material in school; and regular access to reading material at home Detailed examples of learning material availability and of class size differentials across grades by quintile and province are available in Background Paper 3 on school level inequities. [↑](#footnote-ref-12)
13. This includes the National, Provincial and District Teacher Development Centres, SACE, and ETDPSETA. [↑](#footnote-ref-13)
14. Background Paper 5 provides a detailed analysis of the CPTD system with evidence drawn from DBE data for claims made. [↑](#footnote-ref-14)
15. DMPE Presentation to DPME Workshop on the Development of the Draft 2024-29 Medium-Term Plan. 1 December 2023. [↑](#footnote-ref-15)
16. 2017 (reference to be inserted) [↑](#footnote-ref-16)
17. Finance and Fiscal Commission. 2023/24 submission for the Division of Revenue. 2023, p. 157-8 [↑](#footnote-ref-17)
18. Including quantifying the shortfall of funding Early Childhood Education Centres from the Conditional Grant, the extent of funding from the equitable share, and its impacts on resourcing of basic education (which is already constrained). [↑](#footnote-ref-18)
19. This would contribute to strengthening the professional content of circuit manager - school interaction noting the strong views expressed by key stakeholder groups of compliance driven relationship rather than deliberative professionalism. [↑](#footnote-ref-19)
20. The DBE has adopted reading benchmarks for Grade 1 to 3 for Home Languages, and for Grades 1 to 6 for: English First Additional Language, for the Nguni language group, and the Sesotho-Setswana language group, and for Afrikaans. The benchmarking of Xitsonga and Tshivenda has been undertaken in 2023, and data analysis and report writing is underway. [↑](#footnote-ref-20)
21. This, for example, could be aligned with Standardised Output indicator SOI206 [↑](#footnote-ref-21)
22. FFC, 2023, p. 176. [↑](#footnote-ref-22)
23. Mabesele, High Court Gauteng, CASE NO: 2017/01217, and the Juma Musjidcase, BCLR 761 (CC). [↑](#footnote-ref-23)
24. Finance and Fiscal Commission Submission for the Division Of Revenue, 2023/24. 2023, p. 176 [↑](#footnote-ref-24)