

# Management & Leadership

POLICY ■ LEADERSHIP ■ MANAGEMENT ■ GOVERNANCE FOR SOUTH AFRICAN SCHOOLS

## Annual National Assessment: results are in

We have devoted a substantial amount of space in this edition to the first round of the Annual National Assessment (ANA), the results of which were released during the course of July. The DBE has published two reports on the 2011 ANA results, which can be downloaded from its website and which we believe are worth reading for those who would like to get a full understanding of ANA's purpose and what the results have revealed.

Although the results paint a fairly bleak picture of the general quality of our schooling system, it is at least honest and evidence based. The evidence that it provides about the basic levels of literacy and numeracy of Grade 3 learners and the levels of performance of Grade 6 learners in Language (mostly English) and Mathematics, throws a spotlight for the first time on what is or is not happening in primary schools. What emerges is not only clear evidence of poor or inept teaching but also strong evidence that the majority of teachers at this level seem unable to accurately assess the performance of learners in a basic test of the subject that they teach. Evidence of this emerged as a result of a verification process that saw nearly 20 000 ANA tests remarked by 'expert' teachers. The difference between the marks assigned by the teacher and those by the 'experts' who remarked the tests consistently differed by between 10% and 20%. In most cases the 'experts' lowered the marks of the weaker learners and raised the marks of the better-performing learners, which suggests that many teachers are unable to differentiate between good and bad answers except at the most basic level. Sadly there was also evidence of significant levels of dishonesty in some districts and provinces.

The DBE has indicated that ANA will become an annual event and that the results will be used not only to evaluate the hoped for progress that will result from the DBE interventions to improve learner performance, but also to increasingly hold teachers, principals, district officials and even the more senior members of provincial education departments accountable. This is something that we would welcome.

This issue also includes a fascinating but disturbing article based on some interesting research that has been undertaken by the Bureau for Economic Research at the University of Stellenbosch and which looks at factors that influence the employment prospects and payment rates of individuals. The disturbing finding is that race remains a significant issue in determining what a worker gets paid. Their research shows, however, that levels of education and the quality of schooling have a greater influence and that this influence remains an important determinant of an individual's earning power throughout his or her life.

We have also reached that time of the year when schools are preparing their budgets for 2012 and we provide some guidelines on this, together with two checklists to assist those schools who may struggle with the budgeting process.

Other articles we are sure you will find interesting and informative include two by Erich Cloete: one on strategies for improving reading in the foundation phase and the other on how the attitudes and aspirations of parents influence learner performance. ■

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## SM&L

Is published five times a year by Ednews. It seeks to provide the leaders of South African schools with current and relevant information on issues of policy, leadership, management and governance.

# Making sense of the Annual National Assessments (ANA)

**This year, for the first time in this country's history, an attempt was made to test the literacy and numeracy skills of all learners in Grades 1 to 6 enrolled in ordinary public schools. The results of these tests provide the first reasonably reliable and valid measure of the performance of our public primary schools.**

The Annual National Assessments (ANA) were conducted in all public primary schools in the country in February this year. This was, we believe, a very significant event in the country's history. Never before in this country has an attempt been made to test the literacy and numeracy levels of all learners at multiple levels in all public schools. The scale of the undertaking was immense by South African standards. Nearly 6 million learners at a 6 000 primary and combined schools were tested. This number dwarfs the approximately 640 000 candidates who wrote the NSC examinations at the end of 2010. One of the big differences, however, was that the writing and marking of the ANA tests was done by the learners' teachers at their schools.

In her foreword to the DBE's report on the ANA<sup>1</sup>, the minister notes that these tests are one of the key strategies put in place by the DBE to monitor the progress that it is making towards achieving its target of a 60% achievement rate, which is set out in its 'Action Plan 2014: Towards the Realisation of Schooling 2025'. Besides their value as a diagnostic tool, the DBE expects the tests to have four effects on schools:

- to expose teachers to better assessment practices
- to make it easier for districts to identify schools in most need of assistance
- to encourage schools to celebrate outstanding performance
- to empower parents by providing them with important information about their children's performance.

In order to ensure that the results of the tests were reliable and valid the DBE undertook a second parallel process that it called 'Verification ANA' to differentiate it from the general testing that it called 'Universal ANA'. While 'Universal ANA' tested the literacy/language and numeracy/mathematical skills of all learners in Grades 2 to 7, 'Verification ANA' tested the skills of learners in Grades 3 and 6 from a sample of 1 800 schools, 200 from each of the provinces. The management and monitoring of the testing and marking process was far more rigorous in 'Verification ANA' than in 'Universal ANA' with expert examiners re-marking the scripts of all of the Grade 3 and 6 candidates from these 1 800 sample schools.

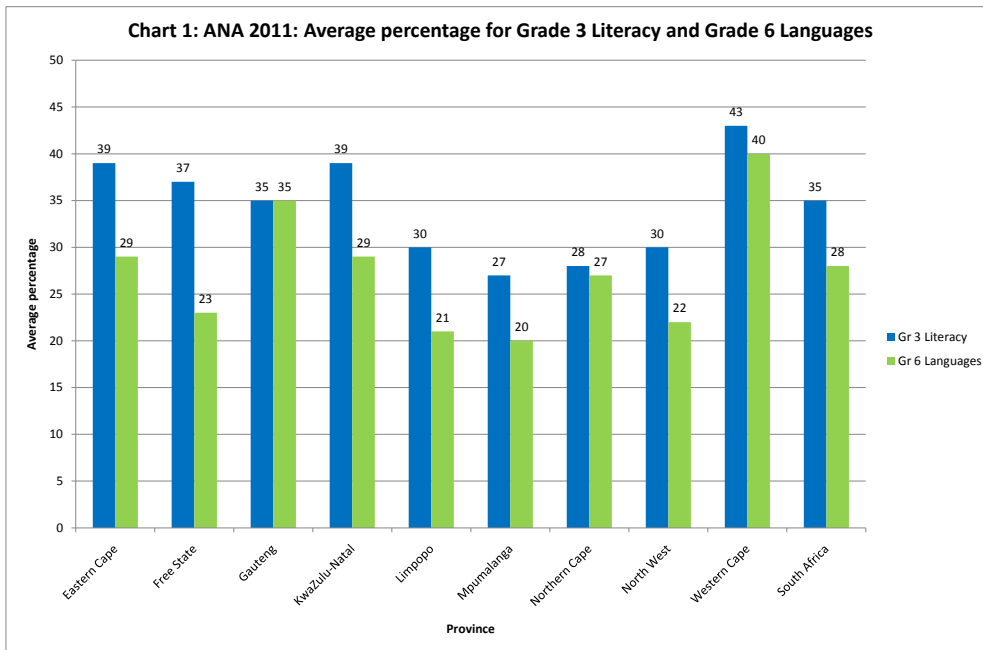
### 'Verification ANA' Statistics and facts

- Grade 3: 19 470 learners from 827 schools
- Grade 6: 19 397 learners from 840 schools
- The Grade 3 and 6 data was mostly collected from different schools. (There were 21 schools mostly from Limpopo from which data was collected for both Grades 3 and Grades 6.)
- The intention was to collect data from the same number of schools (200) in each province but not all identified schools returned data. The worst rate of return was from the Eastern Cape (164 schools) and the best from the Western Cape (193 schools).
- Schools were randomly selected but schools with fewer than 25 learners in a grade were excluded.
- The sample was stratified across quintiles in a way that was designed to provide the same spread in the sample as was present in the province.

The DBE has published two reports<sup>2</sup> on the ANA results. The first is simply a report on the process together with a good and detailed analysis of the results. The second report provides useful guidelines for schools and interested parties on the interpretation and use of the results. We would like to encourage the principals of all primary schools to obtain copies of both reports and to set aside time to study the findings and recommendations, particularly those of the 'Guidelines' report.

The data analysis provided in the reports is mostly based on data collected from the 1 800 schools that formed part of 'Verification ANA' and paints a fairly gloomy picture of the current levels literacy and numeracy at the majority of public primary schools. The results of learners are classified into four levels of performance:

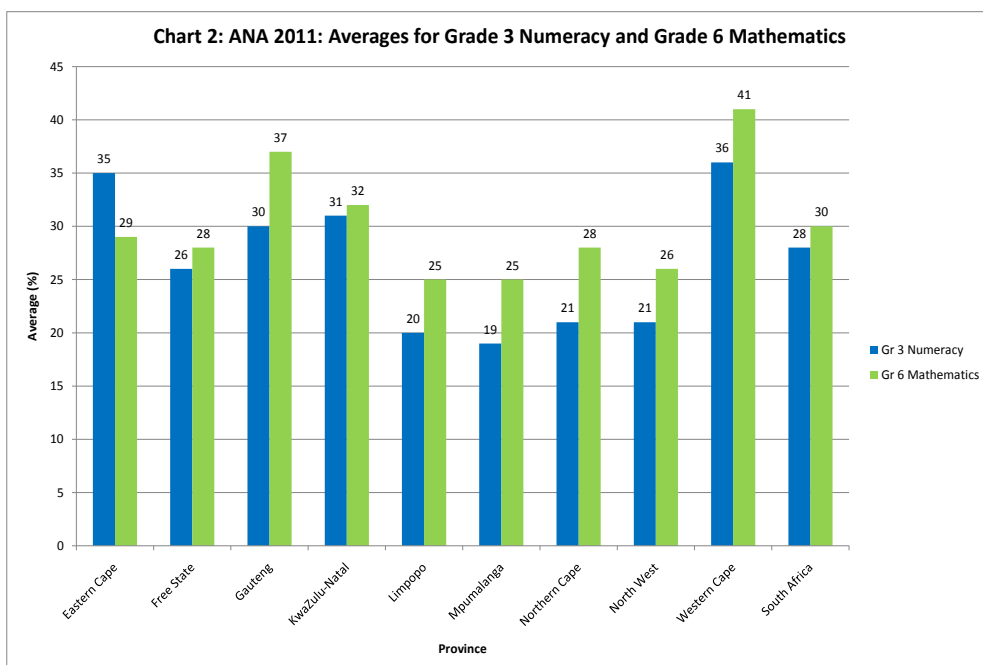
- Level 1 (0–34%): labelled as 'Not achieved'
- Level 2 (35–49%): labelled as 'Partially achieved'
- Level 3 (50%–69%): labelled as 'Achieved'
- Level 4 (70% and above): labelled as 'Outstanding'.

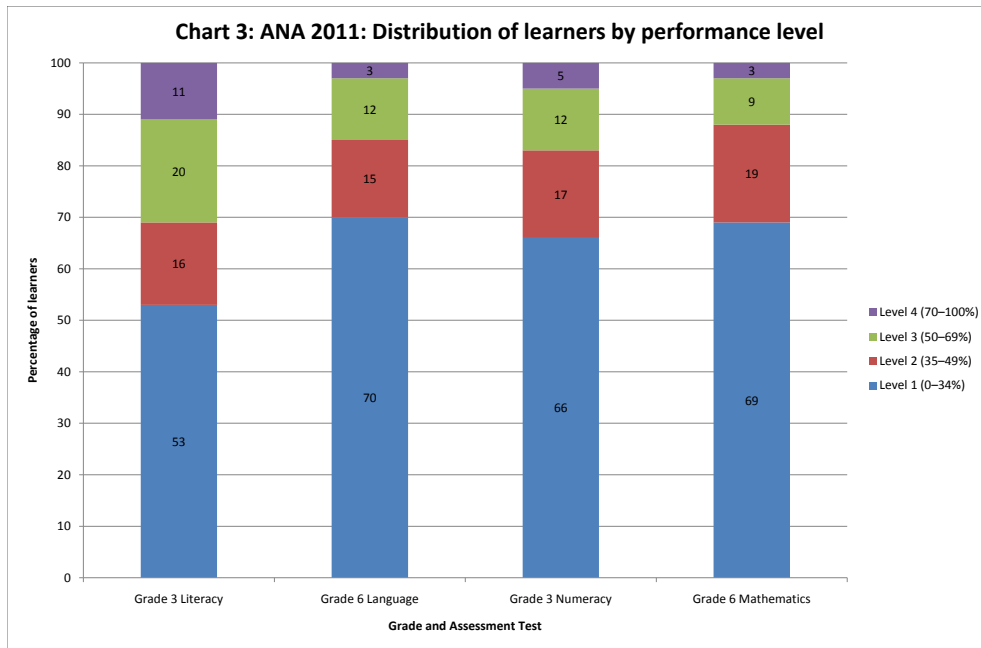


These are the same codes that are used in schools when assessing learners in the Foundation and Intermediate phases, although the percentage the levels represent are not normally indicated. Based on this scale and its descriptors a learner is performing at the appropriate level when he or she has ‘Achieved’ the expected standard, which is a mark of 50% or above. Based on the analysis of the ANA results it was found that only in Grades 1 and 2 did the majority of learners achieve this level of performance.

Chart 1 shows the averages (as a percentage) for Grade 3 Literacy and Grade 6 Languages for ‘Verification

ANA’ and Chart 2 shows the averages for Grade 3 Numeracy and Grade 6 Mathematics. Besides the fact that all these averages are very low, it is interesting to note that while the averages for Grade 6 Languages are well down on those for Grade 3 Literacy, the opposite is true for Numeracy and Mathematics with only Grade 6 learners from the Eastern Cape performing less well in Grade 6 Mathematics than they did in Grade 3 Numeracy. The drop in the Literacy/Language marks is almost certainly to a large part due to the change in the Language of Learning and Teaching (LOLT) in Grade 4 from mother tongue to mostly either English or Afrikaans.

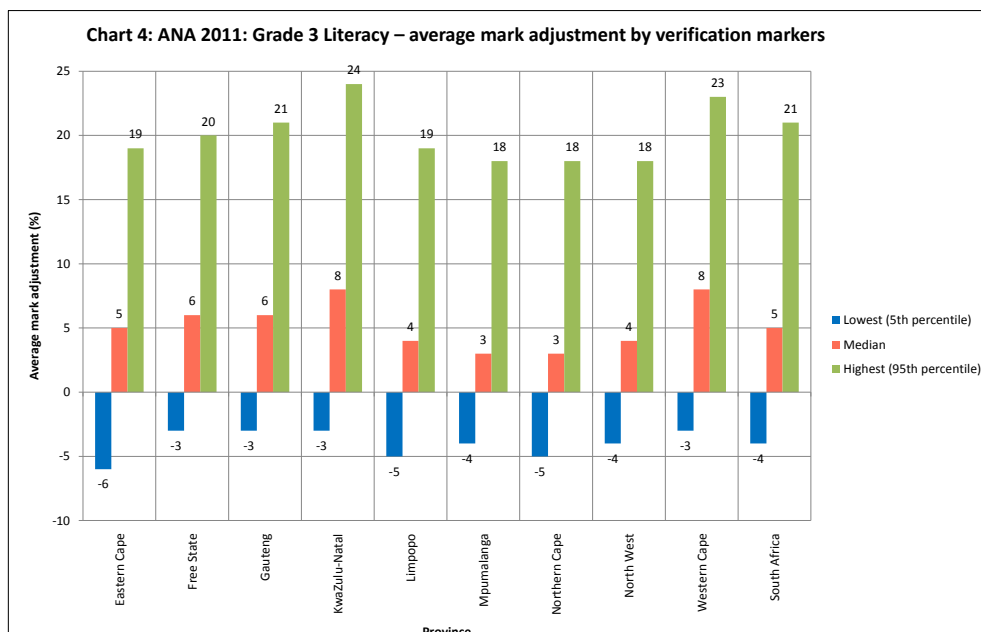


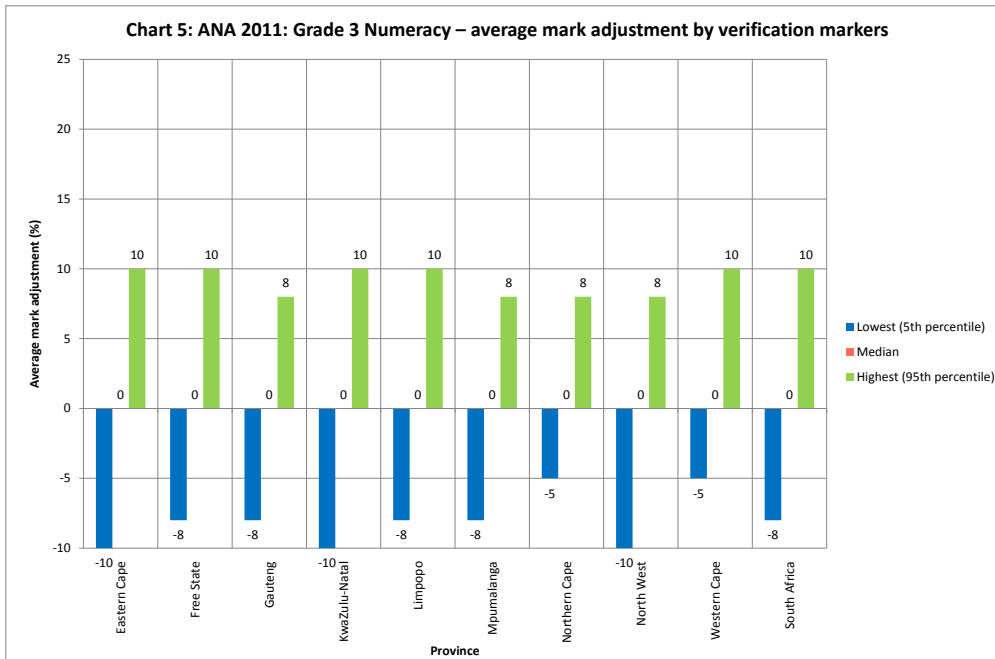


The report had this to say about the results: ‘The distribution of ANA scores by province, grade and subject emphasise the great challenge that the country faces in breaking the legacy of illiteracy and innumeracy in the first six grades of school. In most provinces and most tests, the most common percentage score achieved by learners (the ‘mode’) is below 20%. It is vital that current interventions aimed at accelerating improvements, such as the provision of standardised workbooks to all learners in Grades 1 to 6, should focus strongly on what learners actually learn.’

Chart 3 shows how the results of the ‘Verification ANA’ for Grade 3 Literacy and Numeracy and Grade 6 Language and Mathematics were distributed in

terms of the four performance levels. It is important to understand that it is only when a learner scores 50% or more that he or she is considered to have ‘Achieved’ the expected standard for his or her grade. Unfortunately it would appear that many teachers consider a Level 2 (35–49%, ‘Partially achieved’) score to be a sufficient level of achievement and in doing so undermine the importance of a quality education. If performance Level 3 is used as the benchmark, the poor performance of the majority of learners becomes abundantly clear. In Grade 3 just 21% of learners performed at or above Level 3 (50% or more). The figure for literacy is 31% and for numeracy it is 17%, while for Grade 6 the figures are 15% for language and 12% for Mathematics.



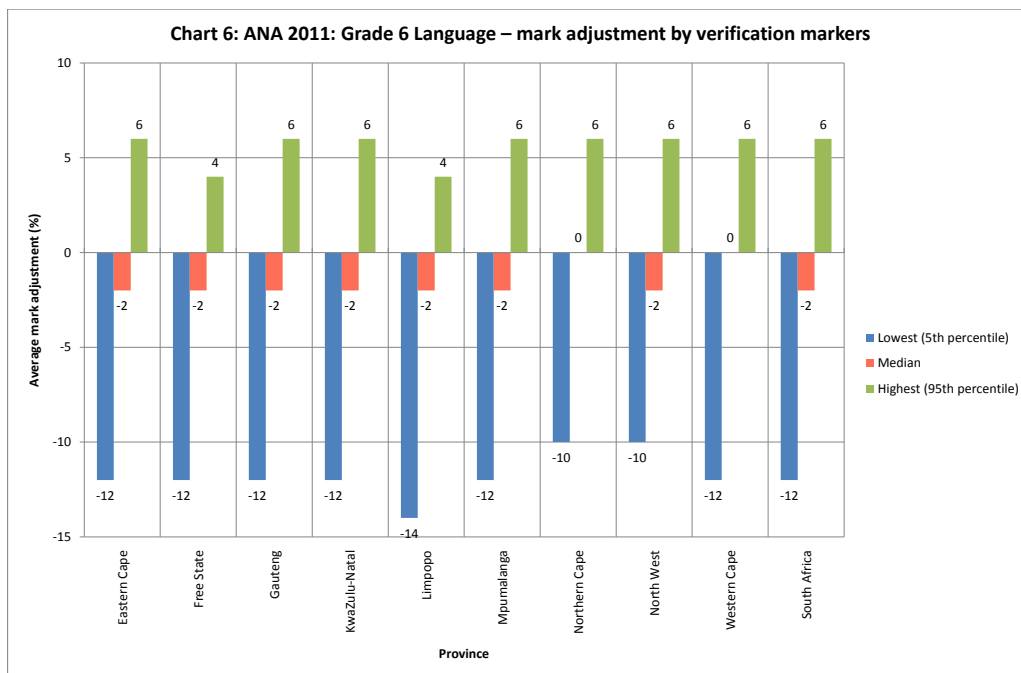


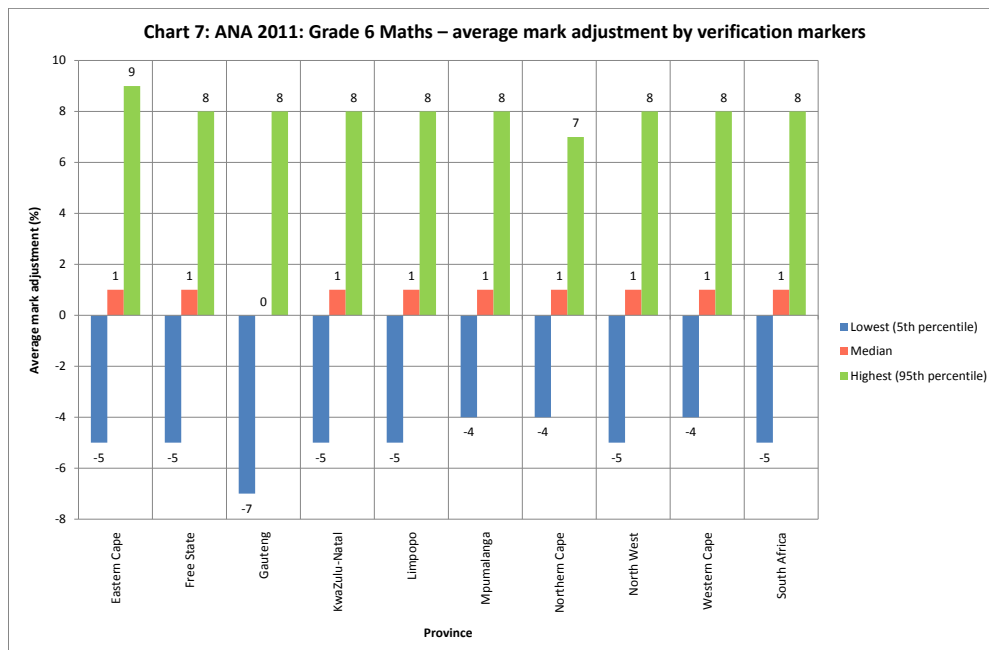
Perhaps more disturbing than this poor level of performance are the huge disparities between the marks awarded by the ‘expert’ teachers who remarked the ‘Verification ANA’ tests and the original marks awarded by the teachers who are responsible for teaching the learners who were tested. Charts 4 to 7 show the differences between the marks allocated by the expert markers relative to the original mark allocated by the teacher.

The figures given in each chart are the average mark adjustment made to the marks of learners whose original

marks fell into one of three performance levels. ‘Lowest level’ learners are those who made up the bottom 5% of the entire group while ‘Highest level’ learners represent those who made up the top 5% in terms of their scores. The ‘median’ group represents those who scored marks that were the same as the median or average mark for the entire group. There are several common features in the data represented in all four of these charts:

- In every case the marks allocated by the expert markers have on average been lower than those of the teachers for the weakest group of learners and higher for the strongest group of learners.



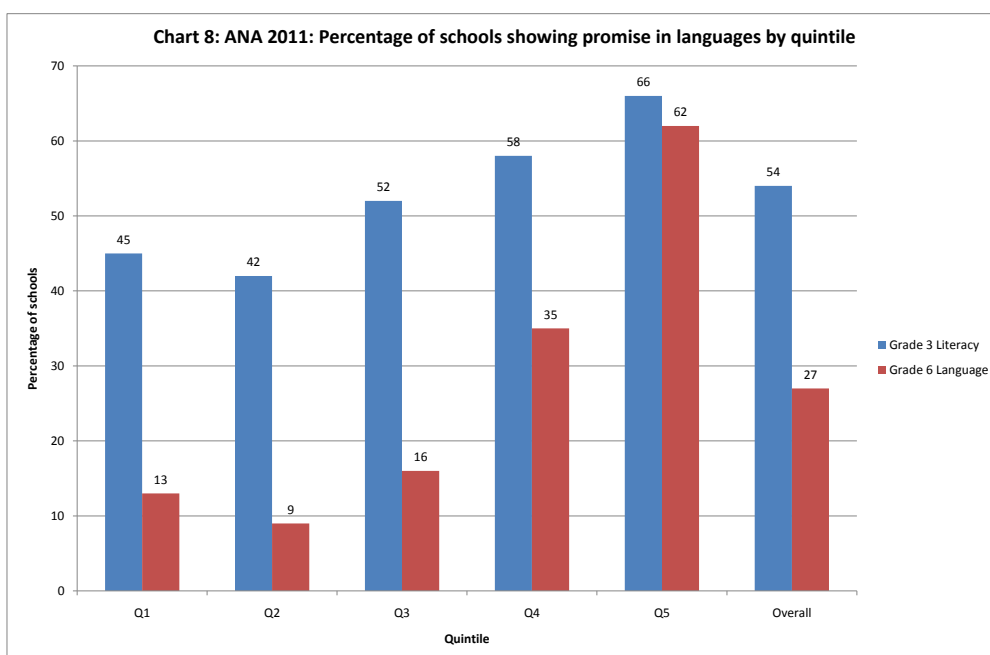


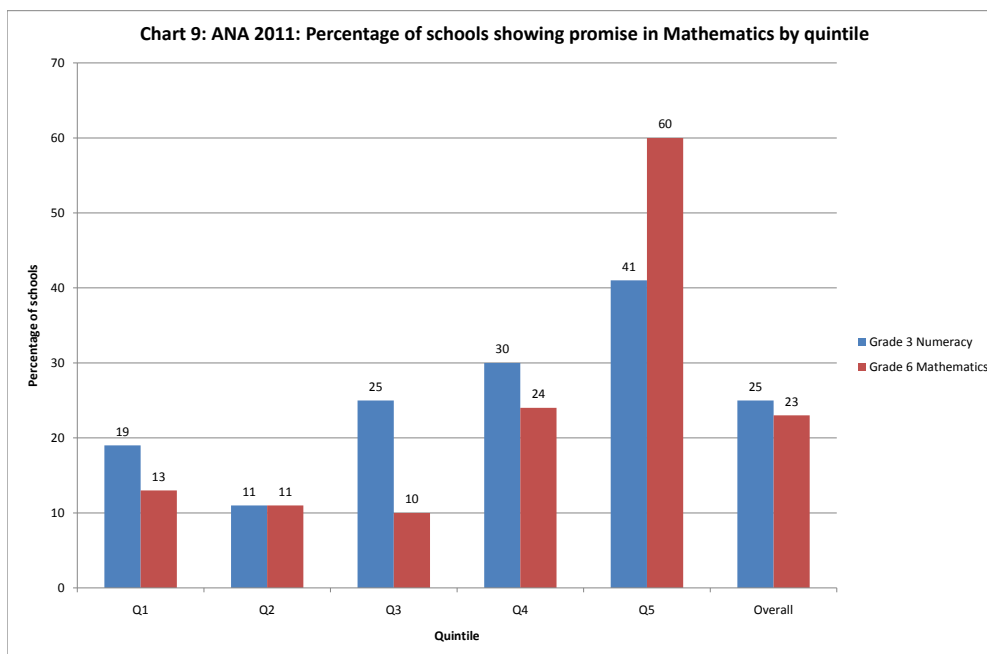
- The differences are substantial – up to 24% on average in the case of the highest level learners in Grade 3 Literacy in KwaZulu-Natal.
- The greatest differences are to be found in the Literacy/Language marks of the better-performing learners.
- The discrepancies are more pronounced in the Literacy/Language marks than in the Numeracy/Mathematics marks.

The range and extent of the discrepancies in the awarding of marks between the teachers and the expert markers is a major concern because it suggests that the majority of teachers are either insufficiently rigorous in their marking of their learners' assessments or that they do not have the subject expertise necessary to distinguish between some right and wrong answers. One could also speculate that these differences may be a consequence of the Curriculum 2005/OBE-based

policy decision to use codes rather than marks when reporting to parents. If, instead of marking, teachers chose or assumed that all that was required from their 'marking' was to assign one of the four 'code levels' to it then you are likely to get the kind of results that the ANA has produced.

One of the other sets of useful and interesting data that the reports provide is data on the performance of schools by quintile and province. Data from two school performance levels is provided for each quintile category: 'Struggling schools', which are schools where the scores of 95% or more of the learners placed them in performance Level 1 (0–34%, 'Not achieved'); and 'Promising schools', which are schools where the scores of 50% or more of the learners placed them in either performance Level 3 or Level 4 (50%–100%, 'Achieved' and 'Outstanding'). Charts 8 and 9 illustrate the data for the 'Promising' schools.





Both charts illustrate quite clearly that the quintile of the school and therefore poverty levels, make a difference. The patterns of the columns also suggest that the inhibitory influence that poverty has on learner performance increases as learners progress to higher grades. Only in 'Promising' quintile 5 schools did learners perform at a similar level in languages in Grades 3 and 6, in all other quintiles the difference in performance was large. The influence on learner performance in Mathematics in 'Promising' quintile 5 schools is quite dramatic – these are the only schools where learner performance in Grade 6 was better than in Grade 3.

The implementation of the first Annual National Assessment of all Foundation Phase and Intermediate Phase learners from public schools this year marks, we believe, a potential turning point in our schooling system. The two reports that the DBE has published on the 2011 ANA process and the results it produced are both excellent documents providing a wealth of data and good analysis of what the testing process revealed about the state of education in our primary schools. The picture they provide is not pretty but at least now everyone knows the magnitude of the challenge and the steps that need to be taken to produce improvement. We are particularly pleased that ANA is to be an annual event because this will provide additional data making it possible to track changes over time and evaluate the effectiveness of interventions. More importantly ANA will provide data that will make it possible to hold teachers, principals and district officials to account for learner performance – something that has been sorely lacking up till now. ■

#### References

- 1 Report on the Annual National Assessments of 2011, Department of Basic Education, Pretoria, 2011
- 2 Report on the Annual National Assessments of 2011, and Annual National Assessments 2011: A guidelines for the interpretation and use of ANA results, Department of Basic Education, Pretoria, 2011. The reports can be downloaded from the DBE website <http://www.education.gov.za/>

#### ANA 2011: The design of the assessment framework

It is standard practice when developing a testing system such as ANA to first develop an assessment framework to guide decisions about such things as the standard, structure and format of the tests. In the case of ANA, the assessment framework included the decision to base the tests on the National Curriculum Statement (NCS) and the achievement milestones that are set out in the Foundations for Learning Campaign.

In terms of the levels of difficulty of questions it was decided that for both the language and the numeracy tests the split would be: 20% easy items, 60% moderate items and 20% difficult items. Questions in the language test were designed to test three cognitive areas: knowledge of basic language concepts, comprehension, and application of language concepts. In the case of numeracy/Mathematics the test questions were designed to test knowledge of basic mathematical concepts (20% of items), application of concepts (60% of items) and non-routine problem solving (20% of items).

In order to better understand the performance levels of learners, the DBE analysed the marked scripts from the 2009 trial run for ANA 2011, from 1 000 schools spread across all provinces.

The language tests were first developed in English and the draft test items were piloted in eight schools. More items were prepared than required which made it possible to discard items that proved not to be suitable. Once the test developers were satisfied with the quality and standard of the English version of the test this was 'versioned' into the other ten official languages (for Grades 1–3) and into Afrikaans (for Grades 4–6). 'Versioning' is a translation process that considers a range of socio-linguistic factors and which improves the comparability of tests in different languages. Tests were also produced in formats suitable for blind, short-sighted and deaf learners to ensure that testing would be as inclusive as possible.

# ANA testing means more accountability

**We expect the task of leading and managing schools to become a lot tougher if all the ‘guidelines’ set out in the DBE’s ANA Guidelines document are implemented next year.**

The preceding article provides a fairly comprehensive review and analysis of the 2011 ANA results. However, we felt that it would also be useful to provide some further information on how the DBE expects to use ANA results in the future based on the recently published ‘Annual National Assessments 2011: A guideline for the interpretation and use of ANA results’.<sup>1</sup>

In the ANA Guidelines document the DBE indicates that an analysis of items will be provided for all Grade 3 and Grade 6 learners and that these will be used to develop a range of courses to support teachers so that they are better equipped to teach and assess learners in areas that the analysis revealed as being problematic. Where identified problem areas are found to be widespread, additional learning materials will be developed for distribution to schools by teacher specialists.

As part of the ANA process school principals will in future be expected to ensure the parents receive ANA results at the end of the school term in which they are released by the DBE, with the suggestion that the ANA results of each learner be incorporated into the learner’s quarterly reports that are issued to parents. Schools are also expected to set aside time when the ANA results can be discussed with parents. In addition a summary of the school’s ANA results, with a School Improvement Plan, must be tabled at the meeting of the Governing Body that follows their release to schools. The Governing Bodies and Senior Management Teams of schools are also expected to work together to drive what the report calls ‘a national initiative that all parents are aware of ANA, its importance and overall strategy to improve learner academic achievement’. The Guidelines document also indicates that parents ‘will receive reports on learner performance that indicate areas of difficulty in terms of concept and skill development, as well as what support their learners need’. We assume that this means that the DBE or the provincial education department will provide this information.

In addition to reporting to parents and the SGB, each principal will also be expected to submit an annual report to their Head of Department (the Head of Basic Education for the province). This requirement has now been legislated in an amendment to Section 16A of the South African Schools Act. The reports are required to provide data on each school’s academic performance

relative to minimum outcomes and standards as well as the extent to which they have followed the assessment procedures set out in Section A. The reports must also provide information on the effective use of resources. These reports must be submitted with the end-of-year schedules to the district office, which will be expected to use them to identify underperforming schools.

Schools identified by the district as ‘poorly performing’ will have to prepare and submit an Academic Improvement Plan to the district indicating how resources will be used and how the academic performance of the school will be improved. These schools will then also be legally required to report by 30 June of the following year to the Head of Department and Governing Body on the progress that they have made on the implementation of the plan.

Although not mentioned in this document, on 16 August Dr S Padayachee (DBE Acting Deputy Director General: Planning), in a briefing to the Parliamentary Portfolio Committee of Basic Education, made it clear that processes are in place that will require principals and deputy principals to enter into ‘performance contracts’ with the department and that ‘Performance will be measured in terms of the academic performance of the school and against the quality of management of the school’.

The DBE’s Guidelines document provided detailed and fairly specific guidelines not only on what principals are expected to do but also on the roles and responsibilities of the management teams of schools, of Circuit Managers and of Subject Specialists. The document also stresses the importance of ‘evidence’ and evidence-based decision making. The message from the document is clear – ANA results will be used to assess individual and institutional performance at every level in the system and to hold them to account where there is underperformance and targets are not met. It’s tough talk and with NEEDU poised in the wings, waiting to spring into action, principals and others in leadership positions should expect their jobs to become a lot tougher in the future. ■

#### References

- 1 Annual National Assessments 2011: A guideline for the interpretation and use of ANA results, Department of Basic Education, Pretoria, 2011.



# ANA in the portfolio committee

In a presentation to the Parliamentary Portfolio Committee for Basic Education, Dr S Padayachee (DBE Acting Deputy Director General: Planning) provided some interesting insights into the DBE's views about ANA that were not evident in their published reports. What follows is a summary of what we consider to be the most important of these.

## Trends

- Results in Grade 1 and 2 were seen as very promising. The DBE believes this is in part attributable to the expansion of Grade R, the introduction of standardised learning material for Grade R, the introduction of Foundations for Learning, and the success of interventions to improve Literacy and Numeracy in the Foundation Phase. These interventions have not yet been fully implemented to scale in Grade 3, which is why the performance of Grade 3 learners remains poor.
- Girls generally perform better than boys in all grades.
- 70% of Grade 6 learners perform at Level 1 (less than 35%) and only 5% of learners perform at Level 4 (70% and more).

## Lack of generic skills

- A large number of learners from across the system have 'yet to develop the skill of writing properly and legibly'. This point is amplified by the following: It is 'difficult to establish if they know anything of the tested skills and knowledge and doubtful if they can make sense of what they have written'.
- Many learners could not follow written instructions and appeared not to be able to read with understanding.
- Learners displayed an 'acute' lack of vocabulary particularly from Grade 4 upwards.

## Numeracy

- Learners showed an inability to manage basic operations such as subtraction, multiplication and division involving whole numbers.
- Learners showed an inability to translate problems given in words into a form that could be solved using Mathematics.

## Literacy

- Learners lacked basic skills such as the ability to spell basic words correctly and the ability to apply basic grammar.
- Learners' lack of vocabulary suggested insufficient time was being spent on reading.
- Learners had poor comprehension skills. Questions requiring more than a one-word answer were often not attempted.
- Learners showed an inability to respond to questions such as 'Why?' or 'What do you think?'

## Suggested reasons for poor performance

- A lack of appropriate teaching and learning materials
- Teacher competency in certain content areas
- Time on task by learners and teachers
- The effect of the Language of Learning and Teaching (LOLT) on learners who must make use of a second language
- The general lack of functionality of some schools.

## Next steps (for improvement)

- Banks of suitable exemplar questions will be developed.
- The number of subjects in the Intermediate Phase will be reduced from 2013.
  - From 2012 the LOLT of the school will be taught as a subject from Grade 1 if it is not the home language of learners.
  - Access to Grade R will be increased, with the goal of universal access by 2014.
- 'User-friendly' workbooks will be provided for every learner in Grades 1–6. In 2011 workbooks were printed for 6 million learners. Workbooks will be produced for learners in Grades 7–9 in 2012.
- Teacher development programmes will be strengthened.
- A greater effort will be made to attract young people into the teaching profession.
- NEEDU will begin to operate and will help in identifying critical weaknesses in the system.
- Principals and deputy principals will have performance contracts based on school-wide learner performance data.
- Job descriptions will be developed for Circuit Managers and Subject Specialists, together with

*It is 'difficult to establish if they know anything of the tested skills and knowledge and doubtful if they can make sense of what they have written'.*

the introduction of performance agreements for them with clearly defined performance targets and deliverables.

- Education will be promoted as a social enterprise so that it is not seen as the exclusive responsibility of the DBE. The 'Quality of Teaching and Learning Campaign' is seen as one vehicle that could be used to promote greater involvement of parents and civil society in the drive for better-quality schooling.
- It will be ensured that school management is led by competent staff and is supported by competent and committed officials.

The items we have listed from Dr Padayachee's presentation to the Portfolio Committee provide a good overview of the current shortcomings of basic education as well as a useful 'to-do list' of the things that need to be done to ensure that basic education in this country becomes a successful enterprise.

*Success will depend on the extent to which there is the political will to drive the implementation of the accountability systems that are necessary to ensure that those who occupy leadership positions throughout the system take responsibility for doing the work that they are appointed to do.*

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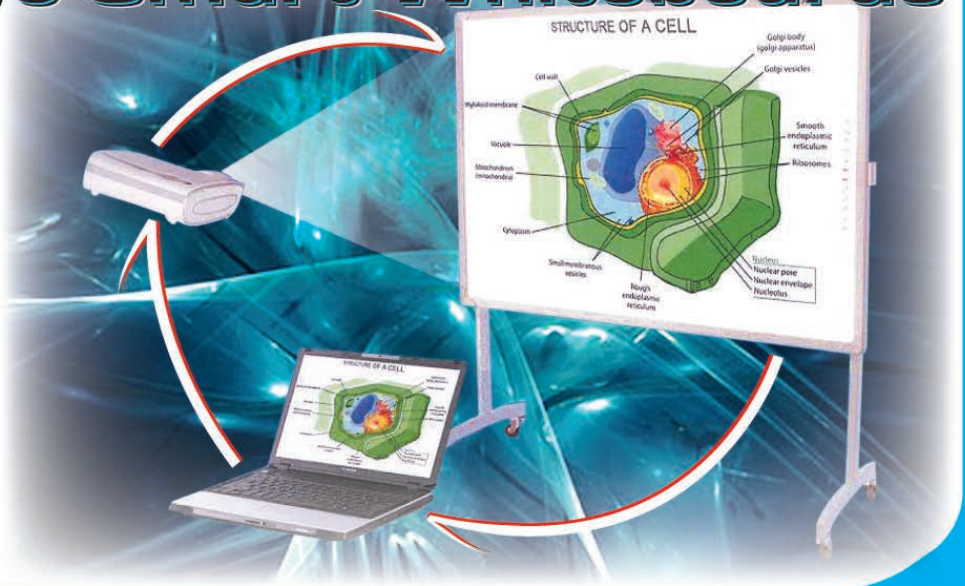
# Interactive Smart Whiteboards

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# Reading in the Foundation Phase – let’s get started!

*Erich Cloete*

**To read is to empower, to empower is to write, to write is to influence, to influence is to change, to change is to live.**

The Manifesto on Values, Education and Democracy states the following important aim: ‘Ensure that every South African is able to read, write, count and think.’ This statement underwrites the National Curriculum Statement (NCS) and was an essential factor when the learning outcomes were designed. Research done by Jet Educational Services on behalf of the Department of Education in 2008 showed only about 36% of learners could read and count by the time they were eight or nine years old. Systemic evaluations – those conducted by the Department of Education, provincial Departments of Education as well as international bodies – showed that learners in South African schools performed poorly when tested for their ability to read at age-appropriate levels. A large percentage of Grade 3 learners were below the required competence for their age level.

South Africa’s Grade 4 and Grade 5 learners came last in a study of 40 countries that took part in the Progress in International Reading Literacy Study (PIRLS) 2006, which was revealed on 27 November 2007 at a news conference in Irene, South Africa by Prof. Sarah Howie and her team from the Centre for Evaluation Assessment at the University of Pretoria, who co-ordinated the research nationally.

A study released on 8 April 2011 entitled ‘Third grade reading predicts later high school graduation’ at the American Educational Research Association in New Orleans says the following: ‘A student who can’t read at third grade level is four times less likely to graduate by age 19 than a child who does read proficiently by that time. Add poverty to the mix and a student is 13 times less likely to graduate on time than his or her proficiently wealthier peer.

On 3 April 2011 an article on News 24 had the following headline: ‘SA pupils fail to make the grade’. In this article Carien Kruger reported that Grade 6 learners from poor backgrounds are the second worst readers from a group of fifteen countries in southern and east Africa.

Grade 3 is a kind of a pivot point. Up to Grade 3 a child learns to read, thereafter a child reads to learn and it is far more difficult to remediate than it would have been if you started before then.

The above clearly shows the importance of getting learners to read at the appropriate levels by Grade 3. To achieve this goal, the leadership of the principal as well as the Head of Department/Phase Head responsible for the Foundation Phase is of the utmost importance and not negotiable.

*South Africa’s Grade 4 and Grade 5 learners came last in a study of 40 countries that took part in the Progress in International Reading Literacy Study (PIRLS) 2006.*

It is therefore necessary and very important for Heads of Department in the Foundation Phase (Grades

R–3) to develop applicable leadership and management strategies in order to improve the reading ability and reading levels of learners at their respective schools. However, before any strategy is to be implemented it is necessary to reflect on the current status to determine if a new strategy will actually be to the benefit of the learners. Why is reflection a good thing? Remember, awareness precedes change. It is therefore necessary for the Head of Department in the Foundation Phase to be aware of the current reality with regard to literacy and reading in the phase before she or he implements.

The following could be of assistance to the Head of Department who sincerely would like to ‘influence the future’ in a special way, by improving the learners’ reading abilities and levels in their schools and ultimately in South African schools.

Make an effort to know applicable policies as well as other relevant documents. Heads of Department need to read, study and apply information from the following policies and documents in their schools. (It is part of a leader’s commitment to life-long learning. I believe a leader should read for at least 15–30 minutes a day.) The documents listed are of importance especially with regard to reading:

- DoE Teaching Reading in the Early Grades, a Teachers Toolkit 2007 – <http://tiny.cc/ejdub>
- National Reading Strategy – February 2008 – <http://tiny.cc/g3rk6>

- Gauteng Primary Literacy Strategy 2010-2014 (only applicable in Gauteng but it is worthwhile to read) – <http://tiny.cc/qj7xk>
- National Curriculum Statement
- Government Gazette No 30880 – Foundation for Learning Assessment Framework.

In order for Heads of Department in the Foundation Phase to be aware of the current reality with regard to literacy and reading in the phase it is necessary to ask critical, probing questions. Please use the questionnaire below as a guideline to:

- reflect on the current situation in the school, and
- develop new strategies that suit the school's particular context.

President George W. Bush of America (2001) said: 'Too many of our children cannot read. Reading is the building block, and it must be the foundation for education reform.' It is not different in South Africa. May we therefore commit ourselves to overcome this challenge through perseverance, dedication and by truly honouring the professional responsibility of our education profession? ■

## Questionnaire: Literacy

### Statistics with regard to performance in literacy in the Foundation Phase

- |  | Yes                      | No                       |   | Yes                      | No                       |
|--|--------------------------|--------------------------|---|--------------------------|--------------------------|
| 1. Do you know what the results of your school's previous systemic evaluation revealed about literacy in the Foundation Phase in your school?  | <input type="checkbox"/> | <input type="checkbox"/> | 12. Do they already make use of ability groups as proposed in the new CAPS document that is to be implemented in 2012?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you know what the purpose of the Annual National Assessment (ANA) is?  | <input type="checkbox"/> | <input type="checkbox"/> | 13. Would your school's reading assessment correlate with the results of an independent test such as done by The Tina Cowley or Stimulus Maksima Reading centre?            | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do you know what the results of the 2010 Annual National Assessment were with regard to literacy in Grade 3 in your school?   | <input type="checkbox"/> | <input type="checkbox"/> | They regard the following silent reading rates as an appropriate rate. You can use these as benchmarks:   |                          |                          |
| 4. Did you compare these results with the results of the 2009 ANA?   | <input type="checkbox"/> | <input type="checkbox"/> | • Grade 1: 80 words per minute with 80% comprehension   |                          |                          |
| 5. Did you analyse the 2009/2010 results?  | <input type="checkbox"/> | <input type="checkbox"/> | • Grade 2: 115 words per minute with 80% comprehension  |                          |                          |
| 6. Have you drawn certain conclusions of what to do, if necessary, to improve performance in literacy and reading levels?  | <input type="checkbox"/> | <input type="checkbox"/> | • Grade 3: 138 words per minute with 80% comprehension.   |                          |                          |
| 7. Is there a correlation between the results of the Systemic Evaluation, ANA and the Continuous Assessment (CASS) in the school? If not, why not?   | <input type="checkbox"/> | <input type="checkbox"/> | If a learner doesn't read at the above levels he or she is not reading on grade level.  |                          |                          |
| 8. Do you analyse the performance of CASS in the Foundation Phase each term in order to identify and provide the necessary support to learners who do not obtain a 50% mark or a Level 3 rating in literacy? | <input type="checkbox"/> | <input type="checkbox"/> | 14. Have you set realistic targets/goals for the phase and each grade respectively based on your analysis of results? Have you developed a realistic reachable action plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Do you have the names of those learners close to you and are you monitoring the support given to them frequently?   | <input type="checkbox"/> | <input type="checkbox"/> |   |                          |                          |

### Attitude and knowledge of the Head of Department including teachers in the Foundation Phase

### Statistics with regard to reading ability/levels in the Foundation Phase

- |  |                          |                          |  |                          |                          |
|--|--------------------------|--------------------------|--|--------------------------|--------------------------|
| 10. Does your school assess the reading level of each learner in the Foundation Phase, with special focus on the Grade 3 learners, at the beginning of each year? If not, why not? | <input type="checkbox"/> | <input type="checkbox"/> | 15. Do you really believe that your and your teachers' efforts would improve the reading levels of the learners or are you overwhelmed by your current reality/challenges? | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Does every class teacher know the reading level/ability of the learners in their respective classes?   | <input type="checkbox"/> | <input type="checkbox"/> | 16. Do you have a positive mindset and do you speak possibility language – 'We can!'   | <input type="checkbox"/> | <input type="checkbox"/> |
|  |                          |                          | 17. Are you satisfied if learners only reach the minimum outcomes?   | <input type="checkbox"/> | <input type="checkbox"/> |
|  |                          |                          | 18. Is everyone aware of the reading methodologies that are used in the phase? Does the school have a good reading programme to support the methodology used?              | <input type="checkbox"/> | <input type="checkbox"/> |

*‘A student who can’t read at third grade level is four times less likely to graduate by age 19 than a child who does read proficiently by that time. Add poverty to the mix and a student is 13 times less likely to graduate on time than his or her proficiently wealthier peer.’*

- |  | Yes                      | No                       |   | Yes                      | No                       |
|--|--------------------------|--------------------------|---|--------------------------|--------------------------|
| 19. Do the teachers in the phase know the following five critical areas of reading that need to be taught with regard to reading:  | <input type="checkbox"/> | <input type="checkbox"/> | 27. Are you linking with community libraries? How many of your poor readers are reading and using either the community or school’s library? Do you record these statistics?                       | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> <li>• phonics</li> <li>• phonemic awareness</li> <li>• fluency</li> <li>• vocabulary</li> <li>• comprehension</li> </ul>  |                          |                          | 28. Do you have enough and appropriate LTSM to support reading in the phase? For example, do you have books at various reading levels?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. Do all the teachers in your school and not only the Grade 1 teachers have a strong knowledge of multiple methods of teaching reading, as teachers are key to the successful reading of learners. | <input type="checkbox"/> | <input type="checkbox"/> | <b>Accountability</b>   |                          |                          |
| 21. Are the teachers assessing whether the used teaching methodologies have resulted in improving reading?   | <input type="checkbox"/> | <input type="checkbox"/> | 29. Are teachers being held accountable for literacy and reading performance?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 22. Is there a learning culture in the phase – are teachers interested to enrol for courses at tertiary institutions. Are they being motivated to do so?   | <input type="checkbox"/> | <input type="checkbox"/> | <b>Community and parent involvement</b>   |                          |                          |
| 23. Do you and the teachers believe in life-long learning? How are you improving your knowledge with regard to the teaching of reading?  | <input type="checkbox"/> | <input type="checkbox"/> | 30. Do you have frequent interaction with the Grade R schools in the community as they play an important role in preparing the learners for formal reading?                                       | <input type="checkbox"/> | <input type="checkbox"/> |
|  |                          |                          | 31. Is there a culture of reading in the community and the school? Do the role players value reading and books? Do parents and teachers encourage learners to read and/or practise their reading? | <input type="checkbox"/> | <input type="checkbox"/> |
|  |                          |                          | 32. Are there reading corners in the classrooms and do they provide for reading material at various levels as the reading competencies of learners are going to be different in the same class?   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Organisational effectiveness or phase effectiveness and resources</b>   |                          |                          | <b>Support</b>  |                          |                          |
| 24. Did you implement the applicable policies (as listed alongside) to improve literacy and reading in the phase?  | <input type="checkbox"/> | <input type="checkbox"/> | 33. Does the Head of Department have the support of the principal?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 25. Does the phase make effective use of the compulsory 30-minute reading period for enjoyment?  | <input type="checkbox"/> | <input type="checkbox"/> | 34. Do you make use of the support of district officials with regard to reading strategies?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 26. Does the school promote reading across the curriculum? If yes, how?  | <input type="checkbox"/> | <input type="checkbox"/> |   |                          |                          |

# Attitudes and aspirations play a major role in children's educational achievement

*Erich Cloete*

Most of the research shows that it is what happens in the classroom that matters most in terms of learner performance. For results to improve, teachers must do a better job in the classroom. The teacher's behaviour and teaching style, the structure of the lesson, the nature of the assignments and informal interactions with learners all have a large effect on learner motivation. That is fair, as teachers are getting paid to do a job and do it well, but ... do the learners of South Africa take enough responsibility for their own learning performance and, if not, why not?

Teachers say: 'My learners aren't motivated,' and then go on and try several strategies to support them ... sometimes without any success as the learner does not co-operate or take any responsibility. Teachers become frustrated, sometimes demotivated, and question their own ability to affect a learner's performance to the better.

South Africa has rich, average and poor communities. This led me to investigate if 'achievement gaps' between children from richer and poorer backgrounds as reflected in communities represented in South Africa's education system have an influence on performance, motivation and the ability of learners to take responsibility for their learning?

## What does research show?

Research done in the UK by Alissa Goodman and Paul Gregg, 29 March 2010, in a study titled 'Poorer children's educational attainment: How important are attitudes and behaviour?', showed that educational deficits emerge early in children's lives, even before entry into school, and widen throughout childhood. Even by the age of three there is a considerable gap in cognitive test scores between children in the poorest fifth of the population compared with those from better-off backgrounds. This gap widens as children enter

and move through the schooling system, especially during primary school years.

Analysis of studies in the UK showed big differences in cognitive development between children from rich and poor backgrounds at the age of three, and this gap widened by age five. There were similarly large gaps in young children's social and emotional wellbeing at these ages.

Children from poorer backgrounds also faced much less advantageous 'early childhood caring environments' than children from better-off families.

For example, compared with children from better-off backgrounds, there were significant differences in poorer children's and their mothers':

- health and wellbeing (e.g. birth-weight, breastfeeding and maternal depression)
- family interactions (e.g. mother-child closeness)
- the home learning environment (e.g. reading regularly to the child)
- parenting styles and rules (e.g. regular bedtimes and mealtimes).

Differences in the home learning environment, particularly at the age of three, have an important role to play in explaining why children from poorer backgrounds have lower test scores than children from better-off families. However, a much larger proportion of the gap remains unexplained, or appears directly related to other aspects of family background (such as mother's age, and family size) that were not explained by differences in the early childhood caring environment.

This suggests that strategies to improve parenting skills and home learning environments cannot, in isolation, eliminate the cognitive skills gap between rich and poor young children. On the other hand, many aspects of the early childhood caring environment do have a positive effect on children's social and

*Strategies aiming to change parents' and children's attitudes and behaviour during primary schooling could be effective in reducing the growth in the rich-poor gap that takes place during this time and ultimately leads to better performance.*

emotional development, meaning that strategies aimed at improving health, parenting skills and the home learning environment could still be very important.

### Primary school

Analysis of the Avon Longitudinal Study of Parents and Children suggested that the gap in attainment between children from the poorest and richest backgrounds, already large at age five, grew particularly fast during the primary school years. By age eleven, only around three-quarters of children from the poorest fifth of families reached the expected levels of performance compared with 97% of children from the richest fifth.

Poorer children who performed well in key tests at age seven were more likely than better-off children to fall behind by age eleven, and poorer children who performed badly at seven were less likely to improve their ranking compared with children from better-off backgrounds – an important factor behind the widening gap.

Some of the factors that appear to explain the widening gap during primary school are:

- parental aspirations for higher education
- how far parents and children believe their own actions can affect their lives
- children's behavioural problems, including levels of hyperactivity, conduct issues and problems relating to their peers.

For example, parental aspirations and attitudes to education varied strongly by socio-economic position, with 81% of the richest mothers saying they hoped their nine-year-old would go to university, compared with only 37% of the poorest mothers. Such adverse attitudes to education held by disadvantaged mothers are one of the single most important factors associated with lower educational attainment at age eleven.

The findings suggest that strategies aiming to change parents' and children's attitudes and behaviour during primary schooling could be effective in reducing the growth in the rich-poor gap that takes place during this time and ultimately leads to better performance.

This research gives us a bit of insight on the effect poor communities and other factors have on learner performance and motivation. We have huge challenges in this regard, not only educationally but also economically.

### Support strategies

Possible strategies for South African schools and School Management Teams to support learners experiencing social and economic constraints include:

- Try to establish a firm base for formal schooling. Quality grade RR and R classes (primary schools) is not negotiable.
- Ensure that teachers improve their skills and knowledge on a continuous basis in order to address learning difficulties.

- It is recommended that teachers be taught how to teach proactively and how to identify learning difficulties and design appropriate teaching strategies. Training could be done by a functional School-based Support Team.
- Give regular feedback to District Offices (HODs and learning area heads) with regard to the quality of workshops and their appropriateness. It is of no use to attend workshops that are unsuccessful, impractical and lack depth.
- Encourage teachers to have a positive mindset and give support to them where possible.
- Managing a class that has learners with different learning difficulties involves a great deal of planning. School Management Teams must ensure that the workload allocation is such that teachers have sufficient time to plan for diverse learning support.
- Encourage the private sector to become involved and find sponsors to provide support services such as speech therapy services, especially in the Foundation Phase.
- Manage admissions properly to ensure appropriate class sizes. It becomes very difficult to address learning difficulties if class sizes are too large.
- To counter the effect of large classes, if possible appoint assistant teachers to assist in these classes.
- Make use of expertise and assistance from more experienced staff members and colleagues. Sharing and comparing ideas is an invaluable source in the development of teaching strategies to address different learners' needs.
- Rekindle the deep-rooted love for teaching and valuing the importance of each individual learner as this could lead teachers to pursue any possible avenue of support or idea-generating contributions from colleagues.
- Draw from own experiences that come about by trial and error.
- Make use of NGOs as part of the school's support system. They could render valuable input with courses on mathematics and reading.
- Arrange extra learning opportunities after school, during weekends or holidays.
- Involve parents by means of parent evenings and give attention to the following:
  - Find ways to improve the home learning environment in poorer families (e.g. books and reading at pre-school level, computers in teen years).
  - Help parents from poorer families to believe that their own actions and efforts can lead to higher education.
  - Raise families' aspirations and desire for advanced education, from primary school onwards.
- Address the child's own attitudes and behaviours through the following:
  - Reduce children's behavioural problems and engagement in risky behaviours by means

of a proper and effectively implemented disciplinary system in the school. Do not tolerate ill-discipline in class.

- Help children from poorer families to believe that their own actions and efforts can lead to higher education.
- Re-instil values. Teach learners to have respect for the learning process

- Raise children's aspirations and expectations
- for advanced education, from primary school onwards.

Be persistent in your efforts and do not give up on the learners you are responsible for. ■

#### References

- 1 Joseph Rowntree Foundation, <http://www.jrf.org.uk/publications/educational-attainment-poor-children>
- 2 Campbell, A. 2006. 'The teaching strategies employed by teachers to support learners with learning difficulties in mainstream classes', Cape Peninsula University of Technology

## Management

# It's budget time

Money is tight for everyone at present and principals and school governing bodies at even the wealthiest schools are generally well aware of this. What principals and teachers sometimes forget as they draw up their budgets for the following year is that the parents of the communities they serve are feeling the pinch just as much as schools are. It is therefore incumbent on the principal and SGB to make sure that the school budget is carefully considered and that the contribution that parents make either in the form of school fees or as taxpayers is spent wisely.

The first step in your budgetary process each year should entail a process of reflection about your school's long-term goals and a review of its priorities. Budgets are as much planning tools as they are tools of financial management and they need to be treated as such. Take a good look at your school's spending patterns over the past year and decide whether the spending patterns reflect your school's priorities. As an experiment, try giving your budget to someone with a level of financial expertise but who does not know your school's priorities, and ask them to see if they can identify the school's priorities from the budget – you may be surprised by what they tell you.

In his book *The Handbook for School Governors*<sup>1</sup> Alan Clarke provides the following advice about budgets and their purpose:

#### A budget is a plan that is used to:

- control your finances
- make sure that you have the funding you need to meet your financial commitments
- make sure that you are able to make confident financial decisions and are able to meet your objectives

- make sure you have enough money to fund future projects
- set out how you will spend your money and where this money will come from.

#### Your budget should also help you:

- manage your money effectively
- allocate appropriate resources to projects
- meet your objectives
- improve your financial decision-making
- identify problems before they occur – such as the need to raise additional finance or to curtail expenditure to prevent cash-flow difficulties
- plan for the future
- increase staff motivation because staff members can plan, knowing how much money will be available to them.

There are essentially six stages to the school budgeting process:

1. The identification and prioritisation of the projects, programmes and activities that will need funding. These should be based on the school's vision and long-term goals.
2. The identification of the resources – that is the people, the materials, time etc. needed to achieve these goals
3. The costing of these resources – what each will cost in rand terms
4. Preparation of the draft budget based on this costing
5. Approval of the budget by the SGB and the setting of fees needed to fund the budget
6. The presentation of the budget and fees to the parents for their approval.



For No-fee schools, the process is a little simpler because there is no need to go through the school fee-setting process, nor the need for this fee to be approved by the SGB and parents. However, No-fee schools have far less money available for discretionary purposes and it is therefore more difficult for them to make funds available for priority areas because most of their budgets are used for essential services such as water, electricity and telephone costs.

Tracking your spending for the current year is a good way to ensure that the financial needs, in terms of the school's goals, are being met. Where there is a good focus on the school's priority areas, spending patterns should show that money has been spent on identified areas as soon as it becomes available. If, however, spending is delayed for reasons other than the non-availability of funds, questions need to be asked about why this has happened. If a principal or teacher is not able to provide a reasonable explanation for why money budgeted for a 'priority' item has not been spent then its value to the school must be questioned. Regrettably, it often happens that the 'must-have' items of one year turn out to be passing educational fads ending up as classroom clutter rather than extensively used resources. It is important therefore for the principal and SGB to interrogate the need for costly items during the budgeting process to ensure that they serve real needs, that they will be fully utilised, and that they will provide measurable benefits in terms of educational outcomes. Computers, interactive white boards and data projectors can all be wonderful educational tools if properly used, yet there are many schools that we have visited that are well equipped with these resources yet seldom use them for their proper purpose.

### **Budget fundamentals**

It is absolutely essential for all schools where budgets are tight to accurately determine the likely real value of the school's basic operational expenses. These are the fixed and recurring costs of the basic services and materials that a school needs to function effectively at the most basic level. For most schools, these will include:

- the costs of municipal services such as water, electricity, refuse removal and sewerage
- essential cleaning materials
- printing costs
- telephone/fax costs
- the cost of essential textbooks and stationery – part

of the budget process should include taking stock of all textbooks so that sufficient and additional textbooks can be ordered to replace those that have been damaged and/or lost. Sufficient funds must be set aside in the budget to provide every learner with a textbook in every subject.

- maintenance costs – that is the cost of materials needed for the routine maintenance and repair of the school's physical amenities (i.e. the mowing of grassed areas and repairs to things such as broken windows and taps)
- essential ICT costs, including costs associated with internet access and software licence fees
- the licence, maintenance and running costs of school vehicles if the school has these
- the salaries of school-employed staff if the school is an employer (i.e. staff that are paid from school funds)
- short-term insurance
- security-related costs – the costs of such things as the maintenance and monitoring of burglar alarms.

*It is incumbent on the principal and SGB to make sure that the school budget is carefully considered and that the contribution that parents make either in the form of school fees or as taxpayers is spent wisely.*

The costs of these basic items cannot be avoided if the school is to function normally. It is possible, with care, to control and in some cases substantially reduce the amount that has to be spent on these essential items but mostly these costs cannot be avoided. The costs of telephone calls, water, printing and textbooks are

good examples of areas where cost savings can be made.

Once the costing of these essentials has been done it is possible to calculate how much money will be left over for spending on the non-essential priority area items by simply deducting the total cost of the school's basic operational expenses from the school's expected income.

For most schools this income is derived from two sources – school fees and the per-pupil Norms and Standards funding allocation that the department allocates to schools each year.

The difference between the school's income and what it must spend on its essential operational costs represents the money that should be

allocated to items that will help the school progress towards the achievement of its goals. It is at this stage of the budgeting process that staff and even the learners can become involved, and inviting them to submit proposals for funding that they think would help the school achieve its goals will encourage them to commit themselves to the achievement of these goals. The submission of these

proposals should be co-ordinated through the school's management structures such as subject and sports heads who should also vet them to ensure that they are realistic and worthwhile. Items that are supported should then be submitted firstly to the SMT who need to critically evaluate each item in terms of the school's priorities and goals. Once agreement has been reached, a final list of approved items, preferably listed in priority order, needs to be prepared for submission to the Finance Committee of the SGB. The items on the list need to be carefully and accurately costed and the total cost should not exceed the amount that the school has available for spending on non-essential items. For fee-paying schools the available funds for these items will form part of the fee-setting deliberations when the SGB meets to prepare its recommendation to parents on the school fees and budget for the following year. Producing a budget that meets the long-term institutional needs of the school in a way that is sustainable and that provides the materials and support the school needs to achieve its long-term goals can be a lengthy process. It may also lead to conflict as different interest groups within the school compete for resources. This is not necessarily a bad thing if it helps sharpen the focus on the things that are likely to have the biggest impact on the school's improvement strategies. Articulating the school's short- and long-term goals at the start of the process in a way that is specific and clearly defined will help ensure that everyone understands the basis on which decisions about spending will be made and this in turn will reduce the likelihood of conflict. A budget with clearly defined goals will also reinforce those goals as members of the school community begin to understand that money flows to the people and projects who work towards the achievement of those goals.

The following questions can be used to help members of the SMT and SGB to evaluate the relative merits of items for inclusion in the school's budget.

- How will this item contribute to the overall vision of the school and will it help the school to achieve its goals? (If the contribution is not obvious and measurable, discard the item.)
- How will learners benefit if this item is included? (They must – the school is there to meet their needs.)
- How many learners will benefit? (More is generally better than fewer.)
- Will the benefits be long- or short-term? (Long-term is better than short-term.)
- Does the teacher or group who submitted the request have a good record of delivering on promises? (Good is better.)
- Is the person/group who submitted the request a valued member of staff whom the SGB wishes to retain?
- Could this money be better spent elsewhere?
- Will spending on this item or project be supported by parents? (They are the ones who pay the fees.)
- Is it affordable and good value for money? ■

### Checklist: The financial responsibilities of the principal

This checklist can be used by the school governing body to ensure that it has the necessary systems in place. It can also be used as the basis for delegating the various tasks listed to the principal, bursar and finance committee, remembering that the school governing body remains responsible and is ultimately accountable for the use and management of school funds.

- The school has a long-term development plan, which includes the maintenance and development of its infrastructure and facilities.
- The financial costs of the development plan have been calculated, and a funding model developed to fund these costs.
- The financial responsibilities of all school staff involved in administering and managing school funds are clearly defined to avoid unnecessary duplication of tasks.
- The job descriptions of all school staff involved in administering and managing school funds prescribe the limits of their financial responsibility and authority.
- All staff have been issued with a copy of the school's policy with regard to the handling of school money, and have signed to acknowledge receipt of the policy and to agree to abide by its provisions.
- The governing body is kept informed of all policy and changes relating to the funding of schools and the financial management of schools.
- The school has an established system of internal financial controls.
- The school's system of internal financial controls is managed on a daily basis by the principal and/or the bursar and/or person delegated with this responsibility.
- Up-to-date financial reports reflecting the school's financial position are prepared monthly for presentation to the governing body (or finance committee).
- Formal prior approval is obtained from the governing body for expenditure on items not included in the budget.
- Recommendations in the school's audit report are considered and acted on promptly where this is required.
- Inventories of all moveable assets are correctly and accurately maintained.
- The school has adequate and appropriate insurance cover.
- The school has a salary and conditions of employment policy, and adheres to its guidelines when making appointments.
- The use of the school facilities is monitored on a regular basis to see that they are optimally used and that their use is cost-effective.

- The school has a proactive cleaning and preventative maintenance plan, which ensures that all facilities and equipment are maintained to a high standard of operational effectiveness.
- There are systems in place to monitor and minimise waste.
- Staffing needs and costs are reviewed annually to ensure that all staff are optimally employed in terms of the level of skills and expertise.
- Student numbers are monitored quarterly to ensure that they match the school's ideal curriculum and funding model.

### Checklist: Budget process

- the person responsible for preparing the budget has been approved by the school governing body, and this has been minuted.
- A time-line for the preparation of the budget has been drawn up that includes:
  - the date of the school governing body meeting to approve the budget
  - the date of the general meeting of parents to approve the budget
  - the date on which notice of the general meeting of parents must be distributed to parents (at least 30 days before the meeting)
  - the date on which the budget must be available at school for inspection by parents (at least 14 days before the meeting).
- The budget to be presented to parents includes:
  - the actual income and expenditure for the previous year
  - the projected income and expenditure for the current year (the full year)
  - the estimated income and expenditure for the next year (the budget)
  - the percentage variance between actual expenditure for the previous year and projected expenditure for the current year for each line item
  - the percentage variance between the projected expenditure for the current year and the budgeted expenditure for the following year (the budget).
- The following line items are included in the budget
  - school fees
    - gross school fees (school fee x number of students)
    - exemptions in respect of school fees
    - bad debt in respect of school fees

- other income (hire of school facilities, tuck shop, etc.), including income from the state (Norms and Standards allocation, unscheduled maintenance allocation, municipal services allocation, etc.)
- other expenses (municipal services, textbooks, maintenance, personnel expenditure, sport, subject materials etc.).
- A balance sheet showing items such as capital expenditure, investments, assets and liabilities is included with the budget.
- The budget has been approved by the school governing body for submission to the parents.
- The notice to parents of the general meeting has been sent out at least 30 days before the scheduled date of the meeting.
- The notice to parents includes:
  - a schedule of current and proposed school fees
  - notification that the criteria and procedure to be followed for fee exemption may be obtained from the school
  - notification that the budget will be available for inspection at school 14 days prior to the meeting.
- The notice to parents includes an invitation to attend the meeting, and informs them that a resolution to approve the budget and proposed school fees will be proposed at the meeting.
- The budget and criteria and procedure for the full or partial remission of school fees are available for inspection by parents 14 days prior to the meeting.
- At the meeting:
  - the minutes of the previous parents' budget meeting are read/distributed to parents
  - an attendance register is taken
  - minutes are taken
  - the detailed budget for the following year is presented to parents
  - parents vote on and approve individually:
    - the fees to be charged for the following year
    - the equitable criteria and procedure for the total, partial or conditional exemption from payment of school fees
    - the budget.
- After the meeting, a notice is sent to all parents informing them of the school fees for the following year and that they can obtain information on the total, partial or conditional exemption of payment of school fees from the school.

#### Note

This article has drawn heavily on material from *The Handbook for School Governors* and the two checklists that accompany the article are based on similar lists in *The Handbook of School Management*<sup>2</sup>. The material is used with the permission of the author and publisher. Both books are distributed by Macmillan and can be ordered either directly from Macmillan (Tel 011 731 3335) or from Juta Bookshop (Tel 021 670 6680).

#### References

- 1 Clarke, A. 2009. *The Handbook for School Governors*. Cape Town: Kate McCallum
- 2 Clarke, A. 2007. *The Handbook of School Management*. Cape Town: Kate McCallum

# Education pays

**Does a good education translate into better pay in later life or does it have little influence on the earning power of individuals?**

Two recently released ‘Working Papers’<sup>1</sup> published by Stellenbosch University’s Bureau for Economic Research (BER) examined the relationship between education and earning power in an effort to identify the factors that have the greatest impact on the future earning power of individuals. In this article we try to unpack some of their findings in an effort to better understand the relationship between education – and particularly quality schooling – and earning power.

Despite the fact that there is now almost universal access to schooling in this country and that the difference in the attainment levels of our different population groups has declined steadily since the establishment of a single public education system, high levels of inequality in the labour market still persist. There is significant evidence that suggests that the root cause of this persistent inequality is a product of labour market practices. As Eldridge Moses, author of one of the papers,<sup>2</sup> puts it ‘employment and earning prospects for white workers are considerably better than [for] their black counterparts’. He goes on to note that: ‘There is now a growing body of evidence which suggests that the quality of education received by South Africans differs markedly amongst and within race groups, and that schools differ substantially in their ability to impart cognitive skills. Thus, years spent attending school is unlikely to be a reliable indicator of actual skills developed.’ It is the actual value of these ‘cognitive skills’ in terms of job prospects and earnings that he attempts to identify in his working paper.

Most economic growth literature uses years of schooling as a measure of the likely productivity of a country. The underlying assumption is that more years of schooling is better and that the economic prospects of a country whose population has on average more years of schooling will be better than those of a country whose population has on average fewer years of schooling. This assumption suggests that the employment and economic prospects of black South Africans should be increasing dramatically along with the substantial increase in the number of black children who attend and progress in school since the advent of democracy. This, however, has not been the case and the author suggests that the reason that this model has failed to predict the reality of what is happening is because it is using quantitative measures

of educational input. These quantitative measures of employability and productivity prospects include such things as the number of young people in school and the number of years of schooling. He suggests that what is rather needed is a qualitative measure of educational output – measures that will provide an indication of the number of learners who exit the system with the knowledge and skills necessary to meet the needs of the labour market. He goes on to suggest that these skills are cognitive skills and that they are mostly found in those learners who have passed in the higher grades, who have better marks and who have attended better schools. He also shows that the labour market pays a premium for ‘quality’ education.

Much of the work of developmental economists focuses on the extent to which education is able to lift individuals out of poverty and deprivation through improved employment and earning prospects. The benefits of education are usually articulated in relation to employment and to future employment prospects – a better education translates into a better chance of being employed, greater productivity and higher earnings. Research also shows that better education provides other additional non-monetary benefits including better health, lower fertility – meaning fewer children to care for – and the ability to become more fully integrated into mainstream society. Some researchers have quantified the rate of return on education and suggest that there is a 10% return on each year of schooling. For a time, investment in primary schooling was thought to have yielded the highest returns and as a result many governments invested heavily in primary schooling in an effort to boost the productivity and economic output of their countries. More recently greater investment in secondary and tertiary education is considered to be equally important because of the increasing demand for workers with higher levels of skill. Interestingly, the contribution that education makes to future employability and earnings extends from one generation to another. Research in South Africa has shown that a matriculant who has one parent who has also matriculated earns about double that of a matriculated peer whose parents have not passed Grade 12. This is a startling finding that suggests that there may be a number of other factors at work in determining the employability and earning power of individuals. These may include the social networks of better-qualified parents as well as the attitudes and ambitions that they instil in their children.

In an effort to improve their economic prospects, many developing countries invested heavily in strategies aimed at getting everyone into school for as many years as possible. The focus has been more about the ‘quantity of schooling’ rather than on the quality of education that the schools provided. Countries measured their success using input data such as education budgets, percentage of children enrolled in schools and years of education. What they found, however, was that these ‘inputs’ did not translate into either improved employment prospects or greater productivity. In South Africa’s case the research suggested that for some population groups more years of schooling have a significant influence on employment prospects while for other groups its influence was found to be minimal.

The influence of educational ‘quality’ on the employment of South African matriculants is dealt with more specifically by Burger and van der Berg in Stellenbosch Economic Working Paper (8/11)<sup>3</sup>. In this paper the authors attempt to determine the extent to which factors relating to education quality may explain some of the differences in the wages paid to black and white workers. In their introduction the authors note that ‘racial differentials’ in terms of employment and wages ‘remain stubbornly large’ despite the fact that we are now 17 years into our democracy and they go on to add that ‘the South African school system performs much the same as during apartheid, with most historically black schools (despite vast improvements in resources) still performing abysmally in terms of cognitive outcomes and most historically white schools (despite significantly reduced funding and now also containing many black children) largely performing as successfully as in the past.’

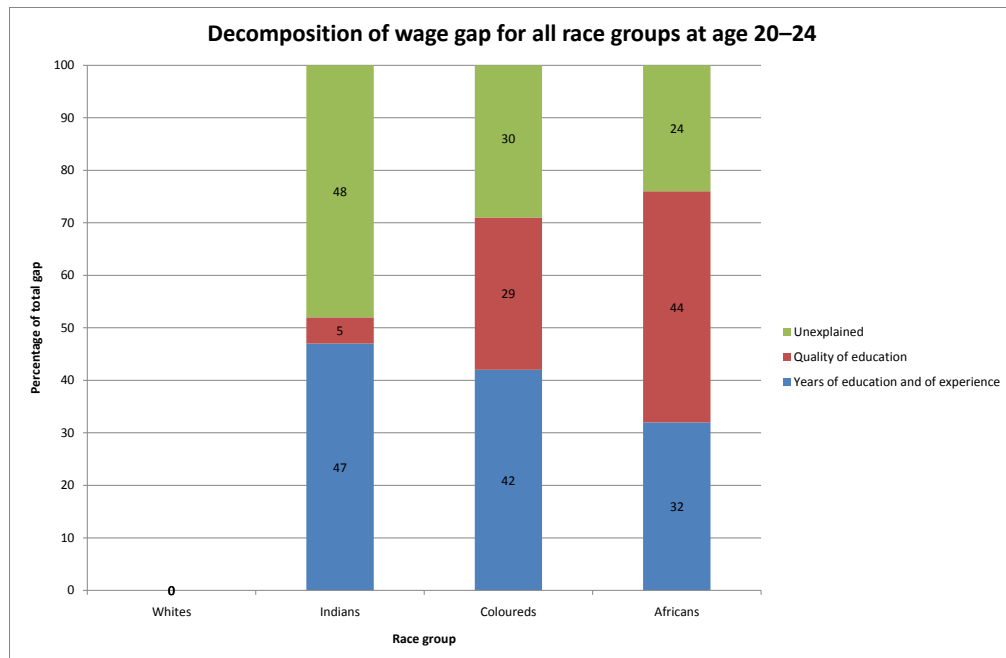
When comparing the employment prospects and conditions of employment, including wages, of different population groups, the term ‘discrimination’ is used to describe differences that cannot be explained by other factors such as experience, education levels and qualifications. The term, as it is used in the literature of this kind, does not have quite the same meaning as when it is used to describe race-based prejudice, although it may include this. Research conducted in this country on labour market outcomes for the years 1994–2004 shows that there has been little change in the level of labour market discrimination and that

about 15–30% of the differences in employment prospects between the different population groups can be attributed to labour discrimination.

In their paper<sup>4</sup> Burger and van der Berg attempt to assess the rand value that various factors contribute to the pay differentials that exist between the four population groups (‘black’, ‘coloured’, ‘Indian’ and ‘white’) that apartheid defined. As we have noted earlier, some of the differences in the pay packets of individuals can be ascribed to factors such as years of schooling, workplace experience and level of qualification. One would expect, for instance, that a worker with a three-year degree and five years of work-based experience would earn more than someone with a Grade 12 pass and no work experience. There are, however, other factors that influence the earning power of individuals, some of which have already been mentioned. These include socio-economic factors, the education level of parents as well as race and gender-based discrimination.

Through their investigation, Burger and van der Berg endeavoured to identify the extent to which the ‘quality’ of schooling influenced employment prospects and particularly the money paid to employees as wages or salary. In developing the statistical model they used to calculate the effects of the quality of schooling on employment prospects, they undertook a detailed race-based analysis of the Senior Certificate results over the past decade. Part of this process involved trying to estimate, in labour-market terms, the comparative value of a year of schooling at a ‘white’, ‘coloured’, ‘Indian’ and ‘black’ school and this part of the study provides some interesting insights into factors within the schooling system that influence performance. One of these is the extent to which a school’s internal results are good predictors of the results that an individual learner will achieve in his or her final Senior Certificate examinations. As part of their study they looked at the extent of the correlation between the CASS marks and the examination marks of schools in the 2005 Senior Certificate examinations. What they found was that for all subjects except History where it was worst for ‘coloured’ schools, the correlation was worst in former ‘black’ schools and best in former ‘white’ schools. The average correlations for non-language and language subjects are given in the following table:

Former school classification	‘Black’	‘Coloured’	‘Indian’	‘White’
Non-language subjects	0.53	0.62	0.73	0.71
Language subjects	0.56	0.70	0.75	0.79



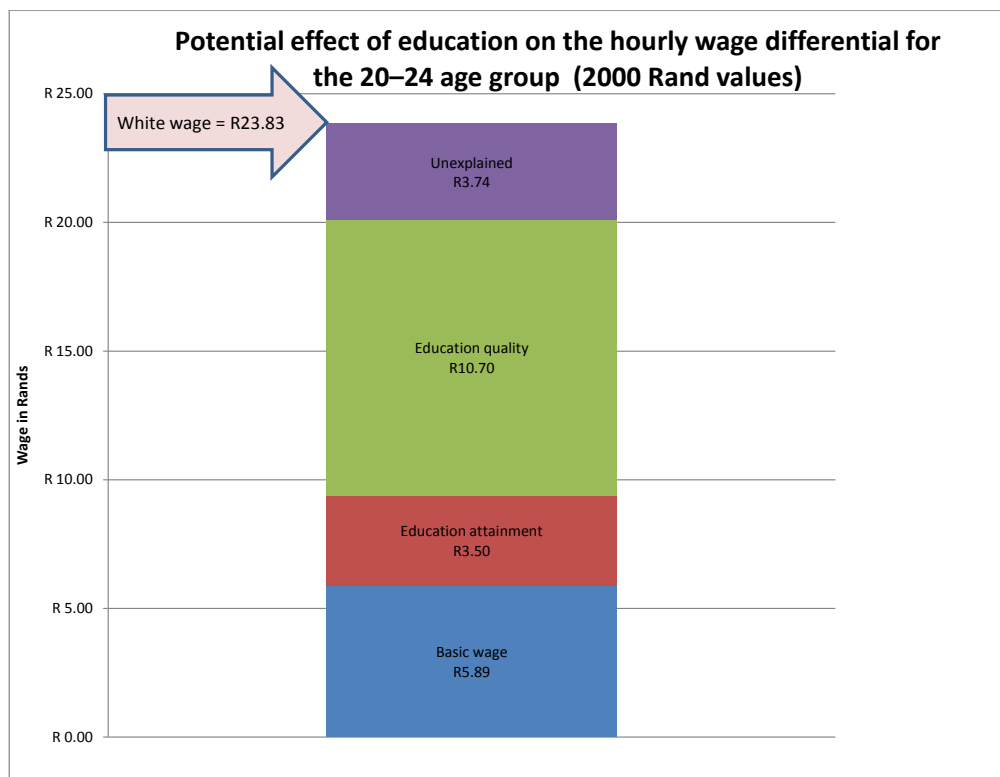
This and other analysis undertaken by the authors altered some of the basic assumptions of their model because it suggested that the internal results in the lower grades at ‘black’ schools may not be reliable measures of learner performance and that, as a consequence, there may be a significant number of learners with potential to succeed, who drop out of school because of the poor and unreliable quality of internal assessment. Fortunately, it is possible, using various mathematical modelling techniques, to factor this variation, which the authors called ‘noise’, into their calculations. Their results are shown in the graph below. What their adjusted results confirmed was that there is more to schooling in labour-market terms than a simple qualification and that the ‘quality’ of schooling contributes significantly to

*‘There is now a growing body of evidence which suggests that the quality of education received by South Africans differs markedly amongst and within race groups, and that schools differ substantially in their ability to impart cognitive skills.’*

the subsequent employment prospects and earning power of individuals. In comparing black and white employees for instance, 44% of the wage gap in the 20- to 24-year-old age group can be attributed to school quality with 32% explained by ‘years of education and experience’. The balance of 24% is ‘unexplained discrimination’, which could include race-based ‘discrimination’.<sup>5</sup> In order to illustrate exactly what their model tells us about the influence that work experience, years of education and school quality have on earning power in the labour market, the authors convert their findings to figures in rands and cents (as illustrated in the graph opposite). They use an hourly rate of R23,83 as the benchmark for purposes of comparison. This is based on rand values in 2000 earned by a ‘white’ worker with a

#### References

- 1 Moses, E. 2011. ‘Quality of Education and the Labour Market: A conceptual and Literature overview’, Stellenbosch: Stellenbosch University Bureau for Economic Research and Burger, C. and van der Berg, S. 2011. ‘Modelling cognitive skills, ability and school quality to explain labour market earning differentials’ Stellenbosch: Stellenbosch University Bureau for Economic Research
- 2 Moses, E. 2011. ‘Quality of Education and the Labour Market: A conceptual and Literature overview’, Stellenbosch: Stellenbosch University Bureau for Economic Research
- 3 Burger, C. and van der Berg, S. 2011. ‘Modelling cognitive skills, ability and school quality to explain labour market earning differentials’ Stellenbosch: Stellenbosch University Bureau for Economic Research
- 4 Ibid.
- 5 See our earlier note about the use of the term ‘discrimination’ in this field of economic research.



‘discrimination factor’ of zero, i.e. the labour market perceives this person to be an ‘ideal’ worker in terms of qualifications, experience, attitudes etc. The basic ‘black’ wage on this same scale is R5,89 but increases by R3,50 to R9,39/hour if the worker has the necessary ‘years of experience and educational attainment’. ‘Education quality’, which we have seen relates to the quality of schooling, can add an additional R10,70 to

this to produce an hourly rate of R20,09. This leaves a difference of R3,74, which is ‘unexplained’ and may include race-based discrimination. What is interesting about these figures is that ‘education quality’ represents the largest chunk of the wage differential between the worst- and best-paid workers. This sends a clear message to the education system of this country that from a labour perspective, school quality counts. ■

### SM&L Comment

*The findings of these two working papers raise a number of issues of concern, the most disconcerting being the persistence within the labour market of race-based discrimination. The fact that this discrimination has persisted for so long into our democracy, despite the fact that there is legislation in place that not only prohibits discriminatory practices but that also seeks to address past inequities through affirmative action policies, demonstrates just how deeply ingrained apartheid practices had become.*

*Also of significance from an educational perspective is the fact that education quality has a greater influence on future earnings than do years of work experience and years of education. The net result of these two factors – race-based discrimination and the influence of school*

*quality – is that school leavers who exit the majority of schools struggle to find decent jobs and will for the most part be poorly paid for the remainder of their working lives.*

*It is not, however, only those who are black and attended schools of poor quality who suffer as a result of these factors. An unskilled workforce also has a significant influence on productivity, which in turn affects the economic growth prospects of the nation as a whole. Iniquitous as race-based discrimination may be, what these papers have shown is that providing schooling of a better quality will do far more to promote the socio-economic interests of the poor than interventions aimed at addressing the continued prevalence of race and other forms of discrimination in the labour market.*

## Education International Congress



*EI Executive Board members with representatives of host unions SAOU, NAPTOSA and SADTU. Left to right: Dr Jopie Breed (SAOU), Mr Henry Hendricks (NAPTOSA), EI President Ms Susan Hopgood (Australia), EI General Secretary Mr Fred van Leeuwen (Netherlands), EI Vice-president Ms Irene Duncan-Adanusa (Ghana), Mr Mugwena Maluleka (SADTU)*

**E**ducation International (EI) is a global federation of teacher unions representing 30 million teachers and education workers from around the world. It is made up of 401 member organisations from 172 countries and territories. EI's head office is located in Brussels (Belgium) and it also has regional offices in Kuala Lumpur (Malaysia), San José (Costa Rica) and Accra (Ghana). The federation holds a World Congress every four years and this year EI held its Sixth World Congress at the Cape Town International Convention Centre from 22 to 26 July. The Congress was co-hosted by South Africa's three largest teacher unions: SADTU, NAPTOSA and SAOU.

Although the congress proper ran for five days there were also three days of pre-congress events starting on Monday 18 July, which included a series of workshops that formed part of a Sexual Diversity Forum as well as caucus sessions devoted to Higher Education, Indigenous People, and Women, and a General Assembly of Education and Solidarity Network. The congress itself is the governing

*'There is a need for teachers to promote the importance of international solidarity as part of the struggle for a world that is free of exploitation and which places more value on the common good.'*

authority of Education International and the decisions taken and resolutions adopted at each World Congress determine the policies and programmes of action that EI and its affiliates will follow in the period between one congress and the next. Progress reports on what has been achieved are then presented at the next quadrennial (four-yearly) congress.

The Executive Board of EI is made up of 26 members. Seven of these are EI officers – the officer positions are President, General Secretary and five Vice-presidents representing the five regional groupings of EI (Africa, Asia-Pacific, Europe, Latin America, and North America-Caribbean). The remaining members are made up of regional representatives (two from each region) and 'open' seats. At least three of the office bearers must be women and at least one member from each region must be a woman. The current president is Susan Hopgood from Australia and the general secretary is Fred van Leeuwen from Netherlands. The vice-president for Africa is Irene





*Irene Duncan-Adanusa, EI Vice-president for Africa in the marvellous 'uniform' of the Ghana National Association of Teachers (GNAT) Ladies Society. The motto under the emblem of the Ladies Society reads 'We live to teach'. Can we say the same about the office bearers and members of our teachers unions?*

Duncan-Adanusa from Ghana, who is also a member of the Ghana National Association of Teachers (GNAT).

Besides the usual business items – elections, the presentation of financial and presidential reports and the like – that form part and parcel of any large international congress of this kind, the congress also included a good number of breakout sessions around the congress theme 'Building the future through quality education'. These sessions, in smaller venues, enabled congress participants to share ideas around specific sub-themes, a list of which is provided in the box on the right. A translation service was provided at each of these venues as well as at the plenary sessions and, with the aid of headphones, participants had the choice of simultaneous interpretation into English, French, Spanish, German, Russian, Portuguese, Arabic and Japanese for the plenary sessions and for most of the breakout sessions, although in some sessions this interpretation was limited to three languages (usually English, French and Spanish).

#### **Breakout session topics**

1. Implementing our education policy
2. Are inclusive education institutions a real possibility or a dream?
3. Stronger together – building better unions
4. The future financing of education
5. Quality teaching: Confronting the challenges of deprofessionalisation
6. Inclusive schools at the heart of the community
7. Building effective partnerships for quality education
8. Education as part of the solution to the economic crisis?

We attended a number of the breakout sessions, each of which had a similar format. The first part of the session consisted of a series of individual presentations by a panel of three or four speakers with interest or expertise in the session topic. This was followed by open discussion, which made it possible for delegates to raise questions and make brief presentations related to the topic from the floor. Panellists would also respond where this was appropriate.

The Congress was opened by South Africa's Deputy-president Kgalema Motlanthe, who in his address supported the congresses theme 'Building the future through quality education' by stressing the need for governments to make quality education their number-one priority. He highlighted the need not only for more investment in education but also for greater social dialogue about quality education. He also suggested that there was a need for teachers to promote the importance of international solidarity as part of the struggle for a world that is free of exploitation and which places more value on the common good.

In her presidential address at the opening session, Education International President Susan Hoggood warned that 'public education is under unprecedented attack' and that, in her view, an attack on public education was an attack on democracy. Other speakers at the opening session included Minister of Higher Education Dr Blade Nzimanzi, Minister of Basic Education Ms Angie Motshekga, and Western Cape Premier Helen Zille. Prior to the conference, the Western Cape branch of SADTU called on the conference organisers to withdraw their invitation to Helen Zille because she was, in their view, 'against' teacher unions. However, this request was turned down as was the union's request to protest her presence. All they were permitted to do was to place pamphlets explaining their views in the public areas outside the venues. The organising committee's refusal to countenance SADTU's demands was based on the fact that Helen Zille was the democratically elected premier of the province that was hosting the conference.



*A delegate from one of the South American countries makes a point in Spanish at the breakout session on the ‘Sustained Funding of Public Education in the midst of the Economic Crisis’.*



*Translation booths. A translation service was provided at each of the breakout session venues as well as at the plenary sessions. With the aid of headphones, participants had the choice of simultaneous interpretation into English, French, Spanish, German, Russian, Portuguese, Arabic and Japanese for most sessions.*



*EI President Susan Hopgood, from Australia, with General Secretary Fred van Leeuwen, from the Netherlands, at a press briefing.*

The conference adopted one policy paper, which was prepared by the EI Board following wide consultations with member organisations. This policy paper is a comprehensive statement that sets out the organisation's view on what constitutes 'Quality Education for All'. We have reproduced the 24-point summary of the policy paper on page 29. The summary was prepared by the authors of the policy paper and formed part of the policy document.

The conference also adopted 11 resolutions and released one statement. Conference resolutions are proposals for policy and/or action, or both. They usually contain a declaration of principle and a demand for action or a change of policy. Statements on the other hand are representative of EI and its member organisations' core philosophy and values. The statement approved at the congress concerned Israel and Palestine. The 11 resolutions are listed alongside. The resolution documents can be downloaded from the EI website: <http://www.ei-ie.org>.

#### **EI Conference resolutions**

- Resolution on Copyright and Education
- Resolution on Sustained Funding of Public Education in the midst of the Economic Crisis
- Resolution on the campaign for quality public education for all in Haiti
- Resolution on Education Support Employees
- Resolution on Teacher Migration and Mobility
- Resolution on Child Labour
- Resolution on Recruitment and Organising
- Resolution: Education Unions Mobilising on Climate Change
- Resolution from the Asia-Pacific Region
- Resolution from the European Region
- Resolution from the North American and the Caribbean Region on Disaster Preparation and Relief



*A delegate from Ghana proudly displays his Suid Afrikaanse Onderwysers Unie (SAOU) cap.*

We have provided a brief summary of the 'Resolution for Sustained Funding of Public Education in the midst of the Economic Crisis' on page 29 in this edition because we believe it includes matters that are of particular relevance to current educational challenges faced by this country. ■

# Summary of the policy paper: Building the Future through Quality Education

The Education International Board prepared this policy paper after wide consultations with member organisations. The policy paper was adopted at EI's Sixth World Congress, held at the Cape Town International Convention Centre in July 2011.

1. Education is a human right and a public good; it must be publicly funded and publicly regulated.
2. Public authorities must provide a legal framework for education in their countries, which sets out the principles of fairness, equity and quality that should underpin education.
3. Public authorities should respect and implement the international conventions on the rights of education employees to organise and bargain collectively and on the status of teachers and other education employees at all levels.
4. Public authorities should spend at least 6% of their GDP on education.
5. Every person has a fundamental right to an appropriate education that will enable that person to achieve their own maximum potential and become a responsible citizen.
6. Education should be of high quality for all.
7. Every student should be entitled to a broad and balanced curriculum in their schools and educational institutions.
8. Quality education is defined in terms of context and culture. Quality is neither one-dimensional nor straightforward. Quality education is defined by its inputs (including students' background, teachers' qualifications, working conditions, class size and investment in education); by the education process (including teaching, parenting and related processes of learning) and by projected outcomes (including the extent to which it meets individual, social, cultural, economic and environmental needs). A contextual approach to quality is never deterministic, as it is contingent upon creativity and constant development. Quality education for all should be established and improved on the basis of best practices, professional experiences and relevant educational research.
9. Teachers should maintain high professional standards and should be accountable to society. The evaluation of teachers should be undertaken in collaboration with peers and competent professionals. It should be based on trust and should help teachers identify their professional development needs.
10. The education of teachers should be of high quality and with opportunities to achieve post-graduate level. It should be followed by a period of structured induction into the profession with the support by a mentor. The teachers should be supported throughout their careers by an entitlement to fully funded continuous high quality professional development.
11. Teachers should be accorded a high professional status in society commensurate with their professional responsibilities, qualifications and skills, and the contribution that their profession makes to the development of society.
12. The salaries, pension schemes and conditions of service for those working in education should be comparable with those available to other groups in society with similar qualifications.
13. Education should be provided on the basis of equality of access and opportunity for all.
14. There should be no discrimination, including that based on gender, disability, faith, race, ethnicity, sexual orientation, cultural or economic background or personal characteristics.
15. Education should be inclusive and instil concepts of equality, tolerance and respect for diversity.
16. Higher education must be accessible to all who meet entry required criteria without financial or social barriers. It must be protected from commercialisation and competition.

17. Education should pay particular attention to issues relating to gender and, in particular, issues relating to gender-stereotyping and gender-based impediments to participation in education, since these affect all students and education employees.
18. Teaching at all levels should be recognised as a professional activity and accorded the same respect and status as other similar professions in society.
19. Teachers should adhere to a code of professional ethics and values to enhance their status.
20. Education employees should share in the responsibility for the governance of their institutions and their professional development. They should engage in partnership with other stakeholders, such as parents and students, to improve and develop their educational institutions.
21. Independent, democratic and representative education unions have a vital role to play in the development and provision of high quality education in society. They should be granted a full role in the debates on the provision and quality of education and should be recognised for the purposes of collective bargaining as the official representatives of teachers and other education employees.
22. International solidarity and partnership in EI with its own member organisations and globally with the inter-governmental institutions that develop education policies has a major contribution to make to the development and provision of quality Education for All.
23. Modern technologies can be aids and supplements to teaching and learning in order to enhance the quality of education. They must be made accessible to all.
24. Education should be provided for people throughout their lives and should promote healthy and sustainable living. ■

## Policy paper on the need for Sustained Funding of Public Education in the midst of the Economic Crisis

**The conference adopted 11 resolutions, which are proposals for policy and/or action. The full list of resolutions that were adopted at EI's Sixth World Congress is on page 27. This is a summary of one of the resolutions, the contents of which are very relevant to South Africa in the light of educational challenges currently faced by the country.**

**T**he EI's policy paper on the need for sustained funding of public education during this period of global economic crisis clearly sets out its views on the value and purpose of public education and challenges the notion that education can be improved through some form of privatisation or private-public partnership.

### **Its principled view is that:**

- Education is a human right and as such needs to be provided with adequate funding, irrespective of the state of the economy.
- A free and universal system of public education is the only sustainable way of providing equal opportunities for all. A free public education system also strengthens democracy and provides those who are poor with a means to escape from poverty.

- Private-public partnerships are not a viable alternative to public education as they lead to lower government spending on education and increased opportunities for privatisation.

In an effort to address the issues that led to the economic crisis, EI plans to campaign for greater regulation of global financial markets. EI sees the need for mechanisms to limit the extent to which financial entities can escape their tax obligations through the use of tax havens and offshore accounts. Their concern relates to the fact that these tax avoidance mechanisms deprive states of the funds they need to finance their public service, including public education. The policy statement goes on to assert that 'responsibility for the crisis lies firmly with the greed and recklessness of the financial sector and the pusillanimity of governments

in condoning that greed and fuelling it with round after round of deregulation'. They note that people who have had to pay the price for this 'greed and recklessness' are 'ordinary people, workers and trade unions'.

The policy paper is particularly critical of the manner in which many states have dealt with the financial crisis. Having provided funding drawn from the public purse to bail out failing financial institutions such as banks, these countries are now cutting education and other public sector budgets in an effort to balance their books. The policy paper also expresses concern at the extent to which education is being privatised and the teaching profession deregulated. Workers' rights are also being increasingly undermined as states attempt to reduce their spending.

The effect of the global financial crisis on higher education has increased the pressure on public universities to adopt a labour-market type approach to courses offered and course design, with a greater focus on short-term courses and research driven by the needs of business. As a result, courses not related to commercial activity are underfunded and marginalised.

**For developing countries the global financial crisis has, in the view of EI, lead to:**

- reduced funding from developed nations, which are no longer willing to honour their funding commitments
- greater inequality between rich and poor
- social unrest as a result of the inability of governments to meet their welfare and developmental commitments
- 'irrevocable damage' to the infrastructure of public services including education.

**The policy paper included an 'action plan' in response to this crisis, which called on the Executive Board to:**

- Seek a commitment from governments to insulate

*'Education is a human right and as such needs to be provided with adequate funding, irrespective of the state of the economy.'*

education against the impact of the global financial crisis and to reinforce their efforts towards the attainment of the Millennium Development Goals and the Education for All goals.

- Call on all member organisations and civil society groups to support quality, free, publicly funded education and to promote it as being in the public good and as a human right.
- Monitor policy developments and their impact on students, teachers and education employees and to advocate against attempts to reduce assessment of quality education to measurable outcomes of standardised testing; and the linking of these outcomes to funding.
- Lobby loan-seeking governments as well as lending agencies such as the IMF to ensure that the conditions attached to loans did not undermine education.
- Organise a global campaign to achieve a benchmark of a minimum of 6% of GDP to be devoted to education in all countries.
- Continue its campaign against poverty and for:
  - the right of every child to education
  - the defence of jobs and pensions
  - the future of democratically controlled education.
- Urge governments to ensure that higher education is accessible to students from poor and working-class communities and that they are provided with the support they need to cope with the demands of higher education.
- Campaign for the cancellation of national debt that limits the development of poor countries as a result of unfair lending terms.
- Campaign for the transformation of the current global economic structure to one based on a democratically constituted 'Global Economic Council' based on the principle of the full equality of states and not 'the rule of might'. ■

# Progress in the DBE's intervention in the Eastern Cape

A press release on 14 September by the Presidency suggests that the DBE's attempts to fix education in the Eastern Cape are at last beginning to make some progress.

In June this year, President Zuma established a task team with the express purpose of bringing some kind of order to what has been a largely dysfunctional Eastern Cape Education Department. Because Education is a concurrent power with authority shared by the provincial and the national governments, the national government had to invoke Section 100 (1) of the Constitution in order to give it the power that it needed to take greater control over the affairs of the Provincial Education Department.

The task team that was established to manage and monitor the intervention strategies includes five members from each of the two spheres of government.

## Representatives of the national government

- Minister of Basic Education, Mrs Angie Motshekga
- Minister of Finance, Mr Pravin Gordhan
- Minister of Justice and Constitutional Development, Mr Jeff Radebe
- Minister of Higher Education, Dr Blade Nzimande
- Minister of Public Service and Administration, Mr Richard Baloyi

## Representatives of the Eastern Cape government

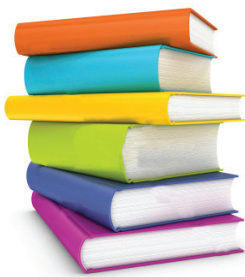
- MEC for Provincial Planning and Finance, Mr Phumulo Masualle
- MEC for Education, Mr Mandla Makupula
- MEC for Sport, Recreation, Arts and Culture, Ms Xoliswa Tom
- MEC for Economic Development, Environmental Affairs and Tourism, Mr Mcebisi Jonas
- MEC for Local Government and Traditional Affairs, Mr Mlibo Qhoboshiyane

The task team is going to have its hands full as it tackles the following problem areas that have been identified as needing 'urgent attention':

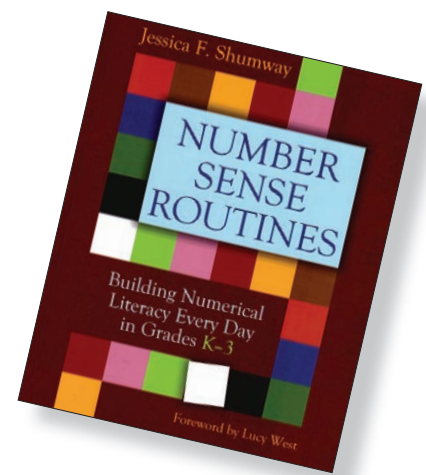
- Provide resources and support to all districts to implement the 2011 Grade 12 learner support programme for spring and weekend extra classes until learners finish writing the end of year exams.

- Strengthen the decentralised National School Nutrition Programme in terms of areas of procurement, facilities for feeding, food handlers, cooking utensils, quality and quantity of food and sound financial management and accountability.
- Finalise the 2012 schools post establishment.
- Ensure that stationery and textbooks are supplied to all learners.
- Provide school furniture to all schools that are in need as a matter of extreme urgency.
- Ensure strict adherence to gazetted dates for the transfer payment of funds to Section 21 schools in terms of National Norms for School Funding.
- Provide proper and sustainable learner transport to all learners who qualify in terms of policy.
- Fill all critical vacant posts for schools of learners with special education needs.
- Implement reversal of irregular salary increases.
- Ensure that substitute posts are filled on time.
- Ensure the merger and closure of schools that are not educationally viable.
- Redeploy excess teachers to where they are needed most.
- Implement the audit rectification plan, so that the department can move from a disclaimer audit opinion to at least a qualified audit.
- Clear backlogs of appeal cases of employees.
- Finalise all outstanding disciplinary cases involving employees.
- Conduct the head count of learners and employees.
- Strengthen the internal audit and risk management unit.
- Improve the expenditure on conditional grants.
- Ensure that there is compliance with legal prescripts pertaining to human resources, finance and other requirements.
- Provide mobile classrooms to all storm-damaged schools until permanent structures are built.

It is a long and daunting list and one just hopes that in the process of fixing these many problems the task team also manages to flush out of the system those incompetent, corrupt and self-serving individuals who created the mess in the first place. ■



## Book review



*Number Sense Routines: Building Numerical Literacy Every Day in Grades K-3* by Jessica F. Shumway, Stenhouse Publishers, 2011  
ISBN: 978-1-57110-790-9; 178 pages

This book has a wealth of useful information and practical ideas on how to help children develop a good understanding of the meaning and use of numbers in their first few years of schooling. Author Jessica Shumway, has taught at second-, third- and fourth-grade levels and has also worked as a Mathematics coach for teachers from pre-kindergarten to Grade 5. She is currently a doctoral student at Utah State University in the United States where she teaches pre-service teachers and studies Mathematics Education.

In the first chapter of the book the author provides a detailed explanation of what 'number sense' means. She suggests that children with 'number sense' have the ability to:

- make sense of what numbers mean, which includes a visual model and concrete understanding of quantities
- look at the world in terms of quantity and numbers
- make comparisons among quantities
- show flexibility, automaticity and fluidity when dealing with numbers
- perform mental maths
- be flexible when dealing with mathematical problems
- make automatic use of mathematical information
- determine whether a given answer is reasonable or not
- decide on a strategy based on the numbers in a problem.

The book provides a host of ideas that teachers can use to help learners develop number sense as they progress through the Foundation Phase. The focus is on the use of daily 15-minute routines that can be used as 'warm-ups' at the beginning of the Maths lesson. All the routines describe involve active lively 'fun' activities designed to help children to use numbers and think about how they use numbers. While the variety and extent of these activities themselves would make this book a good buy, it is the background theory and explanation of the purpose of these exercises that makes the book stand out.

There are four appendices, which include useful resource material for some of the activities that are described as well as additional tools and tips for the routines. The book also includes a comprehensive reference list, some suggestions for further reading and an index.

*Number Sense Routines* should be compulsory reading for all Numeracy and Mathematics subject specialists and should form part of the teacher reference collection of all primary schools because of the detailed and practical advice it provides on teaching strategies for numeracy development in the Foundation Phase. ■

*Number Sense Routines* is published by Stenhouse Publishers, email: [eurospan@turpin-distribution.com](mailto:eurospan@turpin-distribution.com) or website: [www.eurospanbookstore.com/stenhouse](http://www.eurospanbookstore.com/stenhouse). We initially struggled to acquire a copy of this book but were eventually sent a free copy to review from the book's publishers, Stenhouse. If you are interested in purchasing a copy and find difficulty in doing so, please contact General Editor Alan Clarke who will see if he can assist.

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