



Advisory Note 7

NPC Advisory: Basic Education Priorities for the MTDP, 2024–29¹

Improving Planning to Improve Literacy and Numeracy



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Executive Summary

This advisory note provides the rationale and evidence for the basic education recommendations¹ made in the NPC Advisory on NDP Implementation Priorities for the 2024-2029 Medium-Term Development Plan (MTDP) in which the NPC proposed that there be a focus on **planning to improve literacy² and numeracy** as well as on the **prerequisite actions to create the conditions** to achieve this. This includes a deliberative focus on addressing **inequities of resourcing** that impact on performance and doing so **within a rigorous planning framework** so that the system achieves **greater efficiencies, improved quality, and more equitable outcomes**. Improving literacy and numeracy from the foundation years would significantly accelerate progress by addressing the **systemic inefficiencies** that result in failure and repetition and the multiple long-term personal and systemic consequences of poor foundations on subsequent performance and retention. A 2019 paper³ estimates the annual cost of failure and repetition in the South African system to be R20 billion. Improving learner performance in early grade reading and maths would minimise both early grade and subsequent failure and repetition.⁴ Evidence-informed planning aligned with resourcing across clear timeframes is needed nationally and provincially including monitoring and reporting on both implementation and progress against agreed indicators and informing timeous corrective action.⁵

1. The Implications of Anticipated Fiscal Constraints on Planning and Priorities

The recommended NPC priority for the MTDP, that **better planning** is required for **improved literacy and numeracy**, is based on the approach that by improving these foundation skills, *achieving greater efficiencies at the same time as improving quality and reducing inequity*, is possible. Although this would generally be regarded as a useful policy goal, the emphasis on efficiency is critical given the severity of the current fiscal constraints and the need for a reduced but intensive focus on what matters most in basic education.

1 Extensive consultation with both stakeholders and the DBE has informed this advisory note. This has greatly enriched the advisory note, and the NPC is grateful to all stakeholders who have invested their time and energy in strengthening this process. Key points of consensus that emerged in the consultation of 2023 regarding the focus of the advisory note included a need for a focus on the early years at least comparable to the emphasis on the NSC; improving planning including specification of targets and the development of credible implementation plans; improved monitoring of implementation and outcomes; and concerns related to a culture of malicious compliance with little value, which overloads schools with tick-box micro-management, and without substantial professional engagement on issues of quality - knowledgeable guidance' would be more useful than 'authoritarian command' with inadequate information flows. Substantive engagement with stakeholders and the DBE and provincial education departments in 2024 on earlier drafts of the advisory note was invaluable in informing the final advisory.

2 Literacy includes both reading and writing (with comprehension).

3 This was 8% of the total national budget allocated to Basic Education in 2018. (Van Der Berg, S, 2019. The cost of repetition in South Africa. Stellenbosch Economic Working Papers: WP13/2019)

4 "Failing to learn to read in the first three grades has dire consequences for the rest of a learner's schooling career since in Grade 4 learners transition from learning how to read to reading in order to learn other subjects including numeracy are at risk of performing poorly in later grades and even of dropping out of school altogether. It is important that these deficiencies in the early skills be addressed as soon as they are discovered. If this does not happen, learners will not be able to read fluently, let alone understand what they are reading". Funda Uphumelele National Reading Survey, Concept Note

5 The NPC wishes to acknowledge the contribution made by the FEM Education Foundation which funded the time of researchers at RESEP who contributed to the background papers and as critical readers, and the contribution of the Zenex Foundation which supported the costs of the Programme Management of developing this and other advisories for Chapter 9 of the NDP MTDP.

The Finance and Fiscal Commission (FFC) has indicated⁶ that while,

'South Africa allocates a significant portion of its consolidated spending to basic education ...over the last few years and, more specifically, since the onset of the Covid-19 pandemic, spending on basic education has been impacted by the need to reprioritise and cut spending across government. This has been driven by increased pressure on tax revenue and moves towards fiscal consolidation driven by slow economic growth and various economic shocks. As a result, key basic education funding sources, such as the provincial equitable share and basic education-related conditional grants, have been reduced or subjected to slower real growth. It is anticipated that this relative stagnation in spending will continue over the medium term, as government tries to rein in its debt levels and the accompanying interest associated with such debt.'

The FFC anticipates that given the worsening fiscal situation, reductions to planned expenditure will be even greater and noted that 'the 2021 Medium-term Budget Policy Statement indicated the intention to cut basic education expenditure in nominal terms, which implies sizeable cuts in real and real-per-pupil terms'.⁷ The FFC's report demonstrated the impact of fiscal consolidation on basic education allocations since 2012/13 and expects these impacts to continue along a similar trend over the medium-term with differentiated provincial impacts.

The Public Economy Project (PEP) of the Southern Centre for Inequality Studies at the University of the Witwatersrand published an independent appraisal of expenditure choices based on an analysis of budget data.⁸ The paper argues that basic education 'will see significant declines in real resource allocation and will be reduced as a share of the budget' (p.8) and will face 'deep cuts to real spending' (p.9), and that this decline will be evident in 'reduced investment in employee compensation and goods and services'. Reduced expenditure on employee compensation implies larger class sizes while reduced expenditure on goods and services will have consequences for learning materials such as textbooks and school infrastructure.

The PEP study reports that,

'National Treasury has clearly and repeatedly warned that this will lead to an erosion of services and have negative consequences for educational outcomes, particularly for the poorest learners (National Treasury, 2021a: 59; 2021b: 42; 2022b: 58)'. (PEP, p. 13)

The introduction of Grade R as part of the period of compulsory education will put enormous pressure on the fiscus when the Basic Laws Amendment Act is implemented as the changes in conditions of service and potential growth in learner numbers will have budgetary implications. The 2023 Medium Term Budget Statement and the guidelines provided to government departments as they prepare their 2024/5 budgets are unequivocal that fiscal consolidation will be implemented through spending reductions and efficiency measures.

6 P154, FFC Submission for The Division of Revenue, 2023/24, 2023

7 P157, Ibid

8 Spending Choices in Budget 2022. Public Economy Project, University of the Witwatersrand, May 2022

What is clear is that increased efficiency must be pursued in multiple ways, including through planning and implementation, which must be more determined to identify potential internal inefficiencies. There must be a relentless focus on quality, with clear indicators across components. Systemic inequalities that reproduce social inequality must be identified and programmatic steps taken to address these inefficiencies. Wasteful duplication must be ended, and coordination across components of departments must be optimised. The proliferation of ambition found in multiple competing initiatives must be reviewed, and competing priorities, programmes, and initiatives that can be curtailed identified, so that energies and resources are focused on a reduced set of key priorities. Priorities that are not aligned to the guiding framework of the NDP, and the advice of the National Treasury must be critically debated. This is necessary to ensure rapid progress with the core elements of basic education that are critical to achieving national development goals. The prioritisation of key initiatives should be considered rather than an across-the-board ‘trimming’.

2. Problem Statements

2.1 Absence of Indicators to Monitor Progress

While international assessments indicate an improvement in literacy and numeracy scores,⁹ since the discontinuation of the Annual National Assessments in 2015 there have been no national measures before Grade 12 to monitor progress and performance against NDP targets and to guide the work of officials and schools. The results of the Department of Basic Education’s (DBE’s) systemic evaluation of 2021 are anticipated to be released in 2024¹⁰ and will only then provide national and provincial¹¹ baselines against which to measure progress. Sample-based assessment using uniform and standard measures across all schools is essential for planning necessary to guide both support and reciprocal accountability.

2.2 Misalignment between the Loci of Planning and Resourcing

Although high-level policy planning frameworks for improving performance in literacy and numeracy exist at the national level, the available material and human resources to implement these are constrained by the realities of provincial and district¹² budgets. Where these resources are not available, national plans cannot be implemented as intended. National goals are important, but these must be mediated through the reality that the budget required is allocated to provinces through the horizontal division of the national revenue and that Provincial Executive Councils have discretion regarding the allocation of national and provincial revenue for provincial functions. Provincial education budgets and their management¹³ affect the ability to create the necessary conditions to improve literacy and numeracy.¹⁴ Provinces have the primary financial responsibility to ensure that schools have the necessary resources to provide literacy and numeracy, which means that national plans can only be implemented if they are prioritised for funding at the provincial level.

⁹ The data for these problem statements are drawn from DBE documents.

¹⁰ These were not yet available in September of 2024

¹¹ It is unclear if the sample size of 3 000 will provide a valid baseline at provincial level.

¹² ‘District’ in this advisory note refers to school districts as identified by provincial education departments.

¹³ In its *Budgetary Review and Recommendations Report* to the Portfolio Committee on Basic Education on 17 October 2023, the AGSA indicated that ‘the Free State education department is expected to use 45% of its 2023-24 budget to fund the 2022-23 expenditure, which negatively impacts its ability to meet its future service delivery needs. It is concerning that the KZN and FS education departments have expressed significant doubt in the department’s ability to operate as a going concern in the foreseeable future and urgent intervention is required to improve the financial health. (p. 22) https://static.pmg.org.za/231017AGSA_1.pdf

¹⁴ Post-provisioning planning capacity has improved in applying the formula-based model but a lack of understanding of the impact has meant that national salary negotiations result in budget adjustments below the actual provincial costs of the salary agreement.

2.3 Resource Inequities Within and Across Provinces are a Significant Driver of Unequal Outcomes

The prioritisation of improved literacy and numeracy skills requires allocating the requisite human and material resources to support the activities needed to translate this goal into reality. The absence of the key conditions¹⁵ necessary for effective literacy and numeracy skills development in schools correlates with both the socio-economic status of the school (for which the quintile system is used as a proxy¹⁶) and with the educational resource base of the province. These resourcing inequities are widely viewed as factors contributing to the unequal conditions of teaching and learning, and unequal learning outcomes.¹⁷ If we are to achieve the goals of the NDP, improving these conditions must take primacy within an ambitious policy agenda.

2.4 Funding Non-Compliance

2.4.1 Non-Compliance with National Norms and Standards

Several provinces are not compliant with *The National Norms and Standards for School Funding*,¹⁸ which provide School Governing Bodies with the resources¹⁹ to purchase, *inter alia*, learning and teaching support material (LTSM).²⁰ This appears to be a clear contravention of policy on school funding and undermines its equity intentions. The South African Schools Act requires government to fund quintile 1-3 schools (which may not charge fees) adequately and equitably. This is currently not the case.²¹ Failure to fund schools at the minimum levels inevitably results in shortages of those resources, which the per-learner funding norms are intended to support, such as essential LTSM.

15 The key conditions also include issues that require a whole-of-society approach such as school safety. These will be addressed in the Call to Action that will accompany the advisory and be aimed at communities and civil society.

16 A perverse outcome of the quintile system is that in the two provinces, which access private contributions (fees) for between 31- 39% of public schools, the burden on the fiscus is reduced, while in the four provinces which only access private contributions in 1-12% of schools, the state shoulders the full burden of school operational costs.

17 Including class size; availability of learning and teaching support material in school; and regular access to reading material at home

18 While provinces are meant to use the nationally set thresholds as a minimum, the FFC has shown that KwaZulu-Natal has been funding all quintiles below the national threshold since 2014, the Northern Cape has funded its Quintile 1 to 3 learners below the national threshold amount since 2015, Mpumalanga has funded all quintiles below the national threshold amount since 2016, and as of 2021, the Eastern Cape is funding all quintiles below the nationally determined threshold amounts.

19 The National Norms and Standards for School Funding provides an allocation per learner to all schools. Quintiles 1, 2 and 3 schools (no-fee schools) receive a higher allocation per learner relative to learners in Quintiles 4 and 5 schools, which schools may charge school fees.

20 The following categories of spend are intended to be covered in the norms: (1) Learner support material (Textbooks, library books, charts, models, computer hardware and software, television sets, video recorders, Home Economics equipment, science laboratory equipment, musical instruments, learner desks and chairs); (2) Non-learner support material equipment (Furniture -excluding learner desks and chairs- paper copier machines, telephones, fax machines, inter-com systems, equipment for connectivity within the school and to the internet, hardware tools, cleaning equipment, first aid kits, overalls for cleaners and grounds staff, sporting equipment, electrical accessories); (3) Consumable items of an educational nature (stationery for learners); (4) Consumable items of a non-educational nature (Stationery for office use, paper, cleaning materials, petrol, food); (5) Services relating to repairs and maintenance (Building repair work, equipment repairs and maintenance, light bulbs); (6) Other services (Television licences, internet service providers, school membership of educational associations, postage, telephone calls, electricity, water, rates and taxes, rental of equipment, audit fees, bank charges, legal services, advertising, security services, public or scholar transport, vehicle hire, insurance, copying service). The allocation per learner is also intended to assist schools with the payment of utilities such as electricity and water.

21 Financial and Fiscal Commission, 2023. Expenditure Patterns and Equity in Education: National Department of Education. Briefing to the Portfolio Committee on Basic Education, 17 October 2023

2.4.2 Non-Compliance with Constitutional Funding Obligations

Section 29(1)(a) of the Constitution made the right to basic education²² immediately realisable, which means that Provincial Executive Councils are obliged to prioritise constitutional obligations in the provincial division of revenue over other allocation pressures. The equitable share formula indicates what an inter-provincially equitable funding regime should look like and deviations from this should be monitored and corrected where necessary and possible. FFC data shows that this varies across provinces²³ and notes that the Provincial Equitable Share is an unconditional allocation, but constitutional commitments must take primacy with ‘strong links between budget decisions and the realisation or maintenance of access to socio-economic rights’.²⁴ Court judgements are unequivocal that ‘basic education is intended to promote literacy to enable everyone to understand the society in which they live and to fit well in that modern society. Unlike other socio-economic rights, this right is immediately realisable, and must take preference and be protected’.²⁵ Court rulings have affirmed that the right to basic education includes the provision of teaching and learning material, infrastructure, furniture, transport, and provision for special needs education.²⁶ Addressing deficits in the material contexts of teaching and learning and implementing court judgements is thus not only necessary to achieve the goals of the NDP but is a non-negotiable and urgent constitutional obligation. The process outlined in Recommendation 3.3.2 should improve tracking of equitable share issues affecting basic education²⁷ and the education evidence base informing each province’s division of revenue. The NPC supports the FFC recommendation²⁸ that the Minister should, in consultation with stakeholders, use a socioeconomic rights framework as a guide for spending prioritisation in the basic education sector.

“The Constitution and the rights enshrined therein are of paramount importance and should guide the government’s plan of action. While spending requirements will always outweigh available resources, it is important, particularly in a fiscally constrained environment, at the very least, to protect the essential elements associated with the right to basic education. Such prioritisation cannot be afforded in isolation and should encompass reforms and corrective action to eliminate inefficiency in terms of implementation, coordination and other challenges.”²⁹

22 The right to basic education is understood to be the period of compulsory education - General Education and Training from Grade 0 to 9. When the President asse signs the Basic Education Laws Amendment Bill passed by Parliament in 2023 into law, Grade R will become compulsory. The NPC Advisory on ECD (2023, Effective Cross-Departmental And Inter-Governmental Coordination In Early Childhood Development) recommends that while the NDP 2030 advocated for making two years of quality preschool enrolment for 4- and 5- year- olds compulsory before Grade 1, for the foreseeable future the age of compulsory school attendance should remain as the year in which the child turns 6 (which means that 5–6 year-olds would attend Grade R) as is envisaged in the Basic Laws Amendment Act (BELA). The ECD advisory notes Treasury estimates that extending compulsory schooling to Grade R would require extra funding for teachers and infrastructure of up to R17.2 billion annually. (https://www.nationalplanningcommission.org.za/assets/Documents/NPC_ECD%20Advisory_v1.pdf p.23-24).

23 Only in Limpopo has the education share of provincial spending been consistently above the 48% of the PES formula allocated to education, in Limpopo, Mpumalanga and the Eastern Cape this has been between 45 - 47 % of spending in the province. In Gauteng, Northern Cape, and Western Cape the share of spending has consistently been below 39%

24 FFC, 2023/4, p. 188.

25 Mabesele, High Court Gauteng, CASE NO: 2017/01217, and the Juma Musjid case, BCLR 761 (CC).

26 See FFC (2023/4) for an analysis of these judgements.

27 Including quantifying the shortfall of funding Early Childhood Education Centres from the Conditional Grant, the extent of this funding from the equitable share, and the impacts of this on the resourcing of basic education (which is already constrained). It must be noted that “Extending compulsory schooling to Grade R will require extra funding for teachers and infrastructure of up to R17.2 billion annually” (NPC Advisory: Effective Cross-Departmental and Inter-Governmental Coordination in Early Childhood Development, 2024, p.23) which must come from the provincial equitable share). If footnote 20 is correct, then the conditional grant for ECD should be funded entirely from a conditional grant. Legal clarification of the term ‘Basic Education’ in Section 29(1)(a) of the Constitution may be necessary to clarify the constitutional rights of children to education prior to Grade 1 as a funding obligation.

28 Finance and Fiscal Commission Submission for the Division of Revenue, 2023, p. 176.

29 *ibid*

The efficiency improvements and corrective actions proposed in this advisory would contribute to protecting these essential elements.

2.5 Poor Support to Educators is a Major Constraint to Improving Learning Outcomes

In addition to the severe material resource constraints under which many teachers work, the system to support teachers is operating sub-optimally. Curriculum advisers operate in crippling low ratios of adviser-to-school support, which are significantly below the recommendations of gazetted DBE policy. This absence of support contributes to massive internal inefficiencies, particularly because many planned activities assume a capacity that does not exist, and execution is thus fatally flawed from conception.³⁰ The Continuing Professional Teacher Development (CPTD) policy adopted in 2011 has not yet been effectively implemented and teachers do not have access to the CPTD opportunities envisaged in the policy because none of the components are operating as intended.³¹ This absence of opportunity means that teachers only spend an average of 54% of collective agreement requirements on professional development. These conditions will not improve without more effective planning and better use of data across and within departments. The improvement of performance in literacy and numeracy will be hamstrung without decisive and urgent steps and clear timeframes to resolve the challenges identified.

2.6 Planning Systems are Poor

The NPC's 2023 *Review of the NDP* indicated that the planning system is 'disjointed, poorly implemented and misaligned to the strategic goals of the NDP', and is inadequately 'aligned across spheres of government, poorly funded, sequenced, and co-ordinated'. DPME³² and the National Treasury³³ have identified weaknesses in education planning, compliance and outcomes.³⁴ Presentations by the Auditor-General of South Africa (AGSA) to provincial education departments in January/February 2024³⁵ indicated that MTSF indicators were not included in the Annual Performance Plans of some departments and included a summary of lessons from education sector work between 2014-19.³⁶ Planning capacity that diagnoses problems, designs solutions, resources plans, and manages change at an operational level, is weak across the system.

30 This includes other significant current DBE initiatives such as 'curriculum strengthening', the planned renewal of the introduction of Mother Tongue Based Bilingual Education, and the envisaged introduction of the General Education Certificate which all depend on support which meets the professional development needs identified by teachers for their success

31 This includes the national, provincial, and district teacher development institutes/centres, SACE, and the ETDPSSETA.

32 DMPE Presentation to DPME Workshop on the development of the Draft 2024-29 Medium-Term Plan. 1st December 2023.

33 Van der Berg S, Gustafsson M, Malindi K. 2020. Education and Skills for the Economy. Position Paper prepared for the NPC.

34 These include poor differentiation between short, medium, and long-term plans; rigidity of planning systems; inappropriate indicators; gaming resulting from a compliance and audit culture; a lack of integration across the three spheres of government; silo effects within education departments being replicated in departmental planning documents; lack of clarity regarding interlinkages and contributions of budgets and activities to overall outcomes; and that 'long-range trends are not sufficiently reported on and interpreted.'

35 Auditor-General, Education Sector Presentation: Reflections. Presentation made to each province.

36 These include: "While the sector has progressive policies and action plans, there is an information/expectation gap between office-based and school-based officials; schools are not effectively implementing processes that enable the generation of data for evidence-based performance improvement; monitoring done is not enabling officials at schools to provide data for schools' performance improvement; Support provided to schools is hampered by capacity challenges and not informed by evidence, risk or problem based; The different units at district, provincial and national education offices works in silos; and SA-SAMS is not fully utilised for generating and reporting data that would enable school performance improvement".

3. Recommendations

3.1 Institute the necessary steps to increase the proportion of ten-year-old children who can read for meaning and achieve minimum proficiency levels in numeracy by 2030.

This would contribute to the realisation of the NDP goal and the associated targets of improving literacy and numeracy outcomes by focusing on primary schools³⁷ and to the MTSF 2019-2024 outcome of all '10-year-old learners enrolled in publicly funded schools read for meaning'.³⁸ To achieve this, the national and provincial departments should implement reliable, rapid, and regular learning outcomes measurements in literacy, establish achievable learning outcome targets provincially and nationally, promote cost-effective evidence-based interventions, and ensure planning and manage alignment and coordination. The DBE could provide guidelines, to be monitored, with the details for a minimum LTSM package for both literacy (in the home language) and numeracy and include the requirement that provinces report on their resourcing plans to achieve it.

3.2 Address systemic weaknesses in the implementation of legal and constitutional obligations in the resourcing of education.

Urgent steps must be taken firstly, to implement the *Norms and Standards for School Funding* so that all schools receive the minimum per capita allocation, and secondly, to ensure that the constitutional imperative of the 'immediate realisation' of basic education informs the division of revenue of the provincial equitable share in each province on an ongoing basis.³⁹

3.3 Strengthen education planning capacity

3.3.1 Immediately improve the functioning of the current planning system in basic education

The NPC will convene a small seminar with a focused group of participants to analyse challenges in the functioning of the current planning system in basic education,⁴⁰ and consider how these can be addressed in the short, medium, and long term.⁴¹ This could include immediate steps to improve functioning within the existing planning framework and distillation of lessons that would be taken forward by the NPC's Building State Capacity task team for the medium to long term.

37 The Sustainable Development Goals require reporting against 'the proportion of children and young people in grades 2 or 3 achieving at least a minimum proficiency level in (i) reading and (ii) mathematics, by sex (SDG 4.1.1a).

38 The MTSF set this target for the outcome: 'a measure of Grade 3 (literacy) performance in the new Systemic Evaluation', [to] be determined after the first assessment' (p. 77).

39 Including reviewing the adequacy of the allocation relative to inflation (e.g. municipal, and LTSM costs)

40 This would include (across all different planning timeframes): evidence-informed planning including rigorous resource alignment (material and human) with the operational level: timeous monitoring of implementation that meaningfully informs the operational level and ensures that where implementation targets are not met, support is offered (reciprocal accountability) differentiated across contexts.

41 This would include, for example: DPME, the Office of the AG, Planning Chief/ Directorates in the DBE and selected provinces, public sector experts, and National Planning Commissioners from both the Education and Building State Capacity Task Teams. The DBE's Education Management Information System section, and the New Leaders Foundation (which supports the implementation and use of SA-SAMS [the South African School Administration Management System] in Districts and Schools), could be requested to explore the greater use of SA-SAMS in the planning process. The NPC could assist in convening this meeting.

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

The DBE and many provincial education departments have limited capacity for using financial and non-financial data to inform planning. The NPC endorses the recommendations of the Financial and Fiscal Commission,⁴² which could inform the substantive work and outputs of the education sector. The NPC also endorses the planning tasks identified by the DBE and recommends that these be part of the substantive work of the programme.⁴³ This process should improve research and analysis capability and culture, strengthen high-level analyses of provincial performance,⁴⁴ and establish the basis for better national-provincial engagement in meeting funding targets. There should be an explicit focus on planning to address the enabling conditions for improving literacy and numeracy at provincial and district levels over the MTDP period.⁴⁵ National strategies could be implemented using provincial and district data to develop plans so that the first iteration is available by August 2025 for implementation in the 2026/7 financial year. Subsequent iterations should inform annual resource allocation and planning at all levels. This process might review planning and monitoring indicators in key areas to inform the annual planning process. The alignment of planning indicators would enable provincial and national monitoring of the implementation of plans in an iterative manner so that strategy is based on the evidence of differing conditions at the district level. The exercise might also consider the appropriate capacity for planning units within the DBE and provincial education departments.

The programme should also identify areas where resources could be better utilised such as in the under-utilisation of the 1% payroll levy for skills training. In 2020/1, this amounted to R2.1 billion, which would make a massive difference to the urgent need to resource professional educator development. This would contribute to increased teacher well-being and job satisfaction and comply with collective agreements for professional development and teacher compliance required by the South African Council of Educators (SACE) registration requirements.⁴⁶ Government should lead the implementation of the skills development framework.

This exercise could also contribute to the recommendations of DPME and the AGSA that the explanations for planned performance, analysis of resource considerations, and development of technical indicator descriptions could be improved. Strengthening capacity at national and provincial levels to achieve this, is critical.

- 42 Analyse the cost drivers of the delivery of education services and spending pressures across provinces to assess the adequacy of basic education spending to quantify the impact of current spending pressures and budget cuts on the delivery of basic education services; Protect the redistributive nature of the basic education funding system in the face of potential budget constraints given that funding cuts to schools are likely to have asymmetric impacts across quintiles, with a greater negative impact on lower quintile schools and exacerbate inequities in the system. Quintile 1 to 3 schools must be protected; Availability and access to credible, reliable, consistently collected, and easily comparable financial and non-financial data is critical to better understand the impact of government spending and to assess school performance. Finance and Fiscal Commission. 2023/24 submission for the Division of Revenue. 2023, p. 157-8
- 43 Exploring measures of assessing the school-level socio-economic context to improve the system of funding 'quintiles'; Establishing procedures for monitoring per learner spending by province and district and providing data down to school-level averages; Undertaking an evidence-based review of the norm of the 80:20 split (personnel: non-personnel expenditure) to monitor compliance with school funding norms and advance equity by improving pro-poor provisions of post provisioning norms and non-personnel funding norms and to inform any steps needed to improve these policy measures; Quantifying the costs of grade repetition and impacts on equity; Exploring the funding of school improvement initiatives within the financing framework.
- 44 A more detailed analysis and disaggregation of the current learner-educator ratio needs to be undertaken to understand how this manifests differently across and within provinces, and in different phases and subjects. The highest ratios seem to be in the Foundation Phase where quality improvements are critical to improving success and efficiency in the system. It may be that too-wide an offering of FET subjects in many secondary schools results in unsustainable class sizes, and the consequences of this for an educationally sound distribution of the key resource in education – our teachers – need critical examination.
- 45 National and provincial capacity to analyse national assessments (ELNA, systemic evaluation, PIRLS and SEACMEQ) must be improved.
- 46 This would include reaching a clear understanding: (1) in which provinces, the prescribed 70% of the 1% of payroll that should be reserved by provinces for skills training is reserved and is spent; (2) what percentage of the 30% of the 1% of payroll that goes to the ETDPSETA is utilised by provinces for skills training.

A plan for this process should be developed in partnership with DPME, the National Treasury, the AGSA, and academic institutions. Funds for this process could be allocated in the MTEF or be sourced from donors. Documents developed by, and with, each province in this process should be publicly available. The capacity established should be reviewed at the end of this MTDP and periodically thereafter as an ongoing process. The NPC will convene an initial planning meeting to consider the viability of the recommendation, and possible modes of implementation, and could assist in seeking the necessary funding.

3.3.3 Ensure the education planning capacity-building programme contributes to building realistic, implementable strategies for every province and district, which address systemic inequalities.

Directing immediately available resources to improve literacy and numeracy is imperative and cannot wait until 3.3.2 has been implemented. It is recommended that planning to improve performance in literacy and numeracy commence at schools and in districts in 2025 by building baselines and benchmarks for the necessary conditions, **with a specific focus on primary schools**. This planning needs to be built at school, circuit, and district levels, and the bi-annual reporting of performance against targets should include actions taken to address identified weaknesses so that it informs subsequent planning and resourcing of all proposed activities.

This should be an immediate priority for all district offices and addressed during interactions between circuit managers and schools.⁴⁷ The AGSA has indicated⁴⁸ that planning should ‘commence with school self-evaluation processes as provided for in policy and already mediated by circuit and district officials’. This is consistent with the AG’s advocacy for circuit managers to apply risk- and evidence-based targeted support and to move away from compliance-based planning when compiling improvement plans so that they are based on the material realities of the school and circuit. Planning time frames for district support must be determined by realistic appraisals of district human and material capacity, a selection of achievable priorities, and an understanding of how these will guide planning under these conditions.

This recommendation aims to develop accurate and reliable school data driven by a well-managed education information management system. Data compiled at school, circuit and district levels will determine the scoping and differentiation of prioritised actions possible at school and district levels given the differing material conditions within districts. Plans based on the realities faced by schools should be the building blocks of district plans and must inform provincial plans, which should focus on addressing human and material resource deficits. Strengthened processes of school self-evaluation and improvement planning have the potential to generate the required data to improve the system. If this can be achieved progressively over time, then the provincial and national education departments would have improved and consolidated data for planning, with district and provincial plans being informed by school realities.

⁴⁷ Given that the circuit manager: school support ratio of 1: ±30 is the lowest direct ratio of developmental support to schools in the system and where direct monitoring and support is most achievable.

⁴⁸ Informal communication between the NPC and the office of the AG.

Planning requires indicators to guide resource allocation and action, which are regularly monitored and addressed.⁴⁹ All planning indicators to improve literacy and numeracy should be based on research and evidence. Consultation between districts and school leadership about the proposed indicators before adoption would strengthen the professional relationship between circuit managers and schools. This will address the strong criticism by key stakeholder groups that relationships are driven by compliance rather than deliberative⁵⁰ professionalism and the building of agency. Districts should adopt a differentiated and developmental approach to school support based on the evidence of the differing material and professional needs for support across schools. This should also strengthen reciprocal accountability between school leadership and districts, and school leadership and teachers.

This proposal takes an alternative approach to one where plans are compiled without reference to the actual resources needed for implementation. At national and provincial levels, data emanating from a school- and district-based planning process will be essential to inform the processes recommended in 3.2.1 and 3.3.2. Thus, recommendation 3.3.3, while assisting with the immediate urgency of planning to improve performance in literacy and numeracy in 2025 and future years, will also over time inform and be informed by the processes of 3.3.2.

The urgency of commencing with planning alignment for the 2025 school year cannot be overemphasised.⁵¹ Evidence-based district planning of minimum priority actions to improve literacy and numeracy should inform, and be informed by, provincial budget planning for **2025/6**. Data generated through this process could be used to establish district benchmarks for improvement. The priority actions and indicators should be extended in subsequent years based on the implementation of 3.3.2. The appendix provides an example of a set of minimum priority actions to improve literacy and numeracy in Grades R-4 within districts that can be used to inform, and be informed by, provincial budget planning for **2025/6**. The priority actions and indicators should be extended in subsequent years as the results of the work outlined in priorities 3.1 - 3.3 are available. This table can be extended by districts to include additional grades and material conditions, depending on provincial capacity.

3.4 Address the Systemic Weaknesses related to the Support of Curriculum Specialists to Schools

It is recommended that work is undertaken in 2024/5 to quantify and resolve the extreme challenges faced by curriculum specialists (subject advisers), including their line function and institutional location, be a key focus of the work in the DBE and provinces. Consideration might be given to appointing a dedicated project manager with a clear mandate and time frame reporting directly to the DG because of the complexities of line function overlaps and differing national and provincial roles in this process.

49 Districts could, in interactions with provinces, prioritise within (or extend) this basket based on a realistic appraisal of capacity and resources, and within a multi-year developmental perspective of priorities in building the conditions for improving performance in literacy and numeracy.

50 The practice of reciprocal accountability requires that the *bureaucratic ethos of legalism* (a rule-based orientation in which officials uphold rules, procedures and administrative hierarchies to seek compliance with policy rules in an authoritarian hierarchy) shifts to a *deliberative culture*, which stimulates a problem-based orientation and generates an organisational dynamic centred on solving problems, and encouraging officials to flexibly interpret policies, adapting policy rules to local needs (Mangla, 2022). This could be aligned with the Association of Former DGs position that we need to clearly define what we mean by 'capacity' and 'capability', and how we mobilise these concepts, and that this involves not only knowledge, skills and expertise, but a capable and professional public servant must also have agency, and the willingness to activate that agency (being able and willing to make important decisions, and bear the consequences of those decisions (Association of Former Directors-General: Dialogue Series on the Capacity of the State, PARI, 2023).

51 The NECT's Integrated District Improvement Plan (IDIP) project is well-positioned to support this recommendation. Guidelines for district plans to improve performance in literacy and numeracy could be drafted at national levels by the NECT and the DBE in consultation with provinces before the district planning process for 2025 commences in term 4 of 2024. These could be aligned, where possible, with DBE standardised output indicators to minimise reporting overload.

3.5 Incentivise Partnership Funding to Improve Literacy and Numeracy

The DBE's aim of identifying funding from the fiscus for interventions to enhance quality in targeted schools in line with the spirit of the NDP is supported. However, a specific grant at the national level that prioritises the improvement of literacy and numeracy in the early years backed by clear, evidence-informed plans could be used as a basis for national partnership funding with the philanthropy sector. Motivations for this would include targeted interventions to improve efficiency, equity, and quality in literacy and numeracy in a resource-constrained environment, and obligatory and rigorous monitoring and evaluation that contributes to systemic learning and improvement of literacy and numeracy through enhanced professional practice in participating districts and provinces. It is recommended that the Minister leads a process for this to be considered by the National Treasury for the MTEF period (2025/9) and, if supported, a process be established to implement it.

4. Conclusion

The DBE should exercise its leadership through policy development, monitoring and reporting by strengthening the provincial capacity to engage in budget processes. This should be supported by the implementation of the norms and standards as provided for in legislation, conducting national school monitoring surveys that timeously inform planning, providing thought leadership to provinces on evidence-informed best practices in key areas of education, strategic reflection and advice based on monitoring to provinces to inform better practice, and working with provinces to craft national policies that are realistically implementable within provincial budgets. This will require a public understanding that the relationships between the national and provincial departments are concurrent and not hierarchical except for nationally required norms and standards, as determined by the Constitution.

It would be useful for the DBE to clarify which of the various impact statements, outcomes, planned activities, outputs, policies, and targets in the MTDP, strategic plans, and Annual Performance Plans have a system level perspective for which the DBE cannot be wholly responsible for, and the achievement of which is dependent on actions at the provincial level. This could inform the decisions about the appropriate mechanisms that should be established and monitored to achieve the national education sector goals and strategies in the constitutional and fiscal context of concurrency and cooperative governance, as well as how the DBE's monitoring and support activities can strengthen provincial performance.

APPENDIX: Example of a District-Level Planning Framework to Address the Enabling Conditions to Improve Literacy and Numeracy Performance

Area	Target (all data to be disaggregated by school quintile)
Indicators to monitor progress and to segment teacher support priorities at school, district, and provincial levels. ⁵²	The proportion of children in Grades 1- 4 achieving DBE literacy benchmarks ⁵³ (initial baseline to be established at the district level based on school reports). ⁵⁴ Oral reading fluency assessments conducted by subject-advisers with Grade 3 learners on SA-SAMS generated samples (baseline to be established at district level) ⁵⁵
Learning and teaching support material in literacy and numeracy in Grades R-4.	Workbooks available to every child in all appropriate languages in literacy and numeracy. Literacy material available in the classroom to every child in appropriate languages Take home literacy material available to every child. Availability of structured learning materials for teachers who would like to use these as a resource to foster professional development.
Class size in reading and maths in Grades R-4.	Class sizes in reading and maths exceeding the district-determined 'cap' (the cap being a maximum class size within post-provisioning norm realities, which frame teacher: pupil ratios)
Teacher deployment	Indicator: Number of teachers qualified to teach the subject/ grade (Pre-service)
Teacher support (Grades R-4).	Teachers attending training at least twice in 2025 (subsequently 2026 etc) on pedagogical support in numeracy content and pedagogy ⁵⁶ by grade ⁵⁷ , (disaggregated by SACE accredited/ non-SACE accredited). Teachers indicating that the training in maths pedagogy assisted in improving their practice. Teachers attending training twice in 2025 (subsequently 2026 etc) on pedagogical support in literacy. Teachers indicating that the training in literacy pedagogy assisted in improving their practice Teachers participating in SACE-reported Professional Learning Communities (PLC) focused on improving literacy/ numeracy Curriculum specialists (subject advisors at SES level): school ratios for FP and IP are as per district policy, and all posts are filled. Curriculum specialist leadership positions (DCES) for FP and IP are filled: as per district policy
Use of BEEI Education Assistants (EA)	EA support, and are supervised by, teachers ⁵⁸ in small groups of learners in pedagogical practices such as for example, letter-sound recognition ⁵⁹ , group-guided reading, or using maths manipulables. ⁶⁰
NGOs working in partnership with the district supporting literacy and maths	Number of NGOs working in literacy in primary schools in the district Number of primary schools in the district supported by NGOs working in literacy Appraisal of effectiveness of support for district literacy programmes/ goals and steps taken to maximise mutual support
Identification and promotion of community programmes: Community-based programmes that support literacy and numeracy outside of school hours	Number of community programmes: Community-based programmes that support literacy in primary schools in the district outside of school hours Appraisal of effectiveness and steps taken to maximise mutual support Number of community programmes: Community-based programmes that support numeracy in primary schools in the district outside of school hours Appraisal of effectiveness and steps taken to maximise mutual support

52 Baselines to be established as soon as possible in 2025 for each school and district as a basis for monitoring progress in improving reading and numeracy.

53 The DBE has adopted reading benchmarks for Grades 1 to 3 for home languages, for Grades 1 to 6 for English first additional language, for the Nguni language group, and the Sesotho-Setswana language group, and for Afrikaans. The benchmarking of Xitsonga and Tshivenda has been undertaken in 2023, and data analysis and report writing is underway.

54 The Funda Uphumelele National Reading Survey is currently surveying learners in grades 1, 2, 3, 4, and 6 to track the percentage of children achieving the national benchmarks and the percentage of ten-year-old reading with meaning. This will assist in standard setting, the monitoring of progress, and the identification of support needed within and across schools.

55 The Gauteng Department of Education is pioneering this methodology. A presentation was made by the Director of Education Research and Knowledge Management in the Gauteng Province on the GDE's 'Journey of Oral Reading Fluency (ORF)' to a DBE convened meeting on 16 November 2023. The report indicated that a final report on the ORF research with Grade 3 learners in sample schools would be presented to relevant stakeholders by March 2024. The DBE may wish to support Provinces in exploring the possible application of this methodology.

56 This would include appropriate assessment.

57 This, for example, could be aligned with the Standardised Output indicator SOI206

58 This is based on the principle that BEEI EA are deployed to support the work of teachers only under the direct supervision of teachers.

59 Research has shown the positive impact of the use of EA in this way.

60 This is particularly important in large classes where teachers cannot easily do individual or group work