

## **TABLE OF CONTENTS**

Foreword

Executive summary

1. Progress with the development of school infrastructure
2. Progress with the Administration of Grade 12 Examinations
3. Progress with the procurement and distribution of learning support materials for the opening of schools in January 2003
4. Status regarding the filling of posts at Regional/District and school level
5. Conclusions

Foreword

President Thabo Mbeki

Union Building

Pretoria

Dear Mr President

The Seventh report presents four areas of service delivery in the education system. The first area reported on is progress that has been made in the development of school infrastructure. The report serves as a response to your State of the Nation Address in February 2000 that “no learners should attend classes under trees”. It is the first time that I am reporting on the issue. Consequently, the section on the development of school infrastructure constitutes a major part of the report, particularly because it is quite an undertaking that can only be achieved over a number of years, requiring long-term commitment on the part of government. More important is the impact that this kind of service delivery has on the communities we serve.

The second issue reported on is the administration of Grade 12 examinations at the end of the 2002 school year. This is important, as members of the public have tended to measure the performance of the education system on the basis of Grade 12 results.

Closely linked to the Grade 12 results are two other resource issues. The first is the preparedness of the provincial departments of education regarding the procurement and distribution of learning support materials. The second relates to the filling of posts at school level and at district level.

The report on all these issues gives assurance that the education system is improving from year to year despite the challenges that it faces. I should commend the Deputy Minister of Education and Members of the Executive Council responsible for education in the provinces for their cooperation and effort in handling this enormous task, their officials, and national officials without whose effort this work would not have been possible.

Professor Kader Asmal

Minister of Education

## **EXECUTIVE SUMMARY**

The report gives an account of progress made by provincial departments of education in:

- the development of infrastructure;
- the administration of grade 12 Examinations;
- the procurement and distribution of learning support materials for the opening of schools in January 2003; and
- the filling of posts at Regional/District Level and school level.

### **Development of School Infrastructure**

The report on the development of school infrastructure responds to your State of the Nation address at the opening of Parliament in February 2002. It presents an analysis of the Provincial Education Capital Investment over the period from 1998/99 to 2004/05 financial years. It also presents an analysis of the school infrastructure backlogs based on the School Register of Needs and then compares the MTEF budget allocations with the cost of providing absolute basics by province. The percentages by province are: Eastern Cape – 46%; Free State – 52%; Gauteng – 175%; KwaZulu-Natal – 61%; Limpopo – 30%; Mpumalanga – 35%; Northern Cape – 38%; North West – 38% and Western Cape – 52%.

The report thereafter presents the information on the actual number of schools, toilets built and provision of water from 1999/00 to 2001/02 financial years. The number of classrooms built in the period is: 1999/00 – 1936, 2000/01 – 2267 and 2002/02 – 2660. In the same period the number of toilets built are: 1999/00 – 1345, 2000/01 – 1211 and 2002/02 – 4173. The number of schools provided with water in the same period is: 1999/00 – 252, 2000/01 – 253 and 2002/02 – 181.

After the State of the Nation Address the Minister of Education requested provincial departments of education to submit business plans for school infrastructure development for the next MTEF cycle. These have been analysed to give information for the period 2002/03 to 2004/05. According to the plans the rate at which the

infrastructure will be improved has increased compared to the period 1999/00 to 2001/2. The number of classrooms that will be built in the period is: 2002/03 – 3750, 2003/04 – 4330 and 2004/05 – 4748. In the same period the number of toilets to be built is: 2002/03 – 6562, 2003/04 – 6909 and 2004/05 – 7473. The number of schools provided with water in the same period is: 2002/03 – 202, 2003/04 – 171 and 2004/05 – 182.

The definition of the situations where “learners receive education under trees” has been expanded to include:

- Learners physically outside as a result of the absence or shortage of classrooms;
- Learners receiving education under highly unacceptable conditions such as classes within passages, within toilet buildings, et cetera;
- Learners within unacceptable structures such as shelters; and,
- Learners within overcrowded classrooms.

Further analysis, based on information from the 2000 School Register of Needs, shows that a total of 2050 classrooms will be required to address the above situations. The numbers by province are: Eastern Cape – 223, Free State – 140, Gauteng – 279, KwaZulu-Natal – 430, Limpopo – 397, Mpumalanga – 231, Northern Cape – 53, North West – 193 and Western Cape 104. At an average cost of R100 000-00 for building a classroom and amount of R20,5 million will be required. From an analysis of provincial budgets it seems possible to eliminate situations where learners receive education under highly unacceptable conditions. The figures have recently been provided to the Council of Education Ministers with a request that they should prioritise the elimination of unacceptable conditions under which learners are receiving education.

The poverty alleviation programme, Thuba Makote, is making a substantial contribution to community development. Currently there are 11 facilities under development in the nine provinces. These are located at: Reaipela School, near Kuruman, Northern Cape; Zinyosi School, near Mount Frere, Eastern Cape; Jacob Mdhluhi School in Makoko, Mpumalanga; Thulani Primary School in Mkhuhlu,

Limpopo; Mogale City High School near Magaliesberg, Gauteng; Boitumelo Secondary School near Ficksburg, Free State; Dirang ka Natla School near Klerksdorp, North West Province; Bloekombos Secondary School near Cape Town, Western Province and Machibisa Primary School in Edendale, KwaZulu-Natal. The first of these facilities will be completed by March 2003 and the last by November 2003.

Each community was given a budget of R5.3 million to upgrade existing facilities and to develop new infrastructure. The programme is also making a contribution towards providing skills training to local communities through sub-programmes run by the Department of Labour and the Department of Agriculture. The Department of Health assists with HIV/AIDS training sub-programmes. It is envisaged that the school facilities will be used to continue the skills training sub-programmes.

The international community continues to make substantial contributions towards the development of school infrastructure.

#### *Japanese Grant Aid Programme*

The Japanese Grant Aid Programme built 370 new classrooms (45 schools) in the Eastern Cape during the first phase of support from 1998 to 2000. In the second phase the programme has been extended to four provinces, Eastern Cape, KwaZulu-Natal, Limpopo and Mpumalanga. An amount of R200 million to be divided equally between the provinces has been made available. The funds will be used to 179 new classrooms, 119 rainwater tanks and 287 toilets in 20 schools in the Eastern Cape, 215 new classrooms 154 rainwater tanks and 1116 toilet booths in the 27 schools in KwaZulu-Natal. The construction of the Japanese funded schools in the two provinces should be complete by the end of 2002.

The basic design study for Mpumalanga has been completed and the agreement for the Japanese-funded Mpumalanga School Building Programme was signed on 11 December 2002. 232 new classrooms will be constructed in 20 schools. Construction is expected to be complete during 2003. In KwaZulu-Natal 32 schools are targeted to build 208 classrooms. Construction is expected to be complete in 2004.

## *USAID*

The USAID assistance of R35 million for the reconstruction of flood-damaged schools in Limpopo was completed in 2002. Through this assistance 30 flood-damaged schools were renovated and upgraded. The programme provided and repaired classrooms, administrative areas and teacher facilities. Schools were provided with furniture as well as adequate sanitation facilities.

## *Netherlands Assistance*

The Netherlands support programme for flood-damaged schools in the Northern Province amounting to approximately R 15 million is being utilised to repair and reconstruct 11 schools. Completion of renovations and construction work on the Netherlands programme is expected by March 2003.

## *European Union School Building Programme*

A total amount of R 105,71 million was received since 1998/1999 for this building programme. The European Union further funded Eastern Cape School Building programme, by approximately R 65 million for the remaining work to replace tornado-damaged mud-structure school facilities. Completion of the programme is expected by the end of December 2002.

The European Union has further made available a sum of E40 million for a National Department of Education led infrastructure development programme targeting primary and secondary schools in KwaZulu-Natal and Limpopo provinces. The allocation is flexible and makes provision for the appointment of a Project Manager, based in the Department of Education, to assist the provincial departments. Planning will commence in January 2002.

## **Administration of Grade 12 Examinations**

The report describes the preparedness of the provinces to administer the Grade 12 examinations. A total of 472 362 full-time and 194 681 part-time candidates were registered for the examinations in 2002 compared to 477 955 full-time and 197 783 candidates in 2001. A noticeable decline in the learner numbers is still continuing. The Department is finalising a study of this phenomenon.

Some of the provinces have vacancies in sections that are responsible for this important task, resulting in officials working under pressure despite the provincial departments reporting that examinations proceeded according to plan. There were only six irregular incidents reported by provincial departments. These included:

- Stolen examination papers in the Western Cape;
- Opening of an incorrect question paper in the Western Cape;
- Placing of water jugs and glasses in an examination room in the North West;
- Non-delivery of a question paper in Mpumalanga;
- Writing on behalf an absent candidate in Mpumalanga; and
- Involvement of a delivery vehicle in an accident in KwaZulu-Natal.

None of these incidents compromised the integrity of the examinations. Provincial departments have handled the incidents appropriately. Plans to release the results on 27 December 2002 are proceeding according to schedule.

### **Procurement and distribution of learning support materials**

Provincial departments of education are showing a continued commitment to make available financial resources for the procurement and distribution of learning support materials (textbooks and stationery). The budget for the learning support materials in preparation for the opening of schools in 2003 is R1.56 billion compared to R1.16 made available for the opening of schools in January 2002. The report also details the expenditure pattern for the past two financial years. Most provinces spend most of the funds and in some cases even more.

The only shortcoming relates to the distribution of the learning support materials. Service providers who either have no capacity to deliver the materials or do not honour the contracts cause delays. Despite this most provincial departments reported

that they would have delivered most of the learning support materials before the opening of schools in January 2003.

### **Filling of management posts Regional/District and school level**

All provincial departments have made progress with the filling of management posts at Regional/District level. However, it was only possible to estimate the percentage occupancy of management posts in the Eastern Cape, Gauteng, Northern Cape and Western Cape where all District Managers are in posts and 91% in the North West.

Eastern Cape reported only on the principals' posts without indicating what the staff establishment was. This made it impossible to determine the percentage occupancy. Free State did not delineate the posts. Gauteng reported that all school-based managers occupied their posts by the second term in 2002. The percentage of principals reported to be in their posts in Mpumalanga is approximately 91% with 170 principals' posts vacant. Northern Cape reported that it has currently 6.5% vacant principals posts and 5.6% vacant deputy principals posts. North West reported that it has 97% of the principals in their posts. Western Cape has 93% of the principals in their posts.

The situation in nodal areas has improved. Most of the principals are in posts. There are still vacancies to be filled.

### **Conclusion.**

The report shows improvements in the areas reported on. The improvement of infrastructure will require commitment and dedication for a few years to come before all schools are adequately equipped. The education system is reaching maturity with respect to the administration of examinations. The budget for learning support materials continues to grow but further work is required to deal with the distribution of materials. The filling of posts will be an ongoing issue as personnel leave the system.



## **SECTION 1: PROGRESS WITH THE DEVELOPMENT OF SCHOOL INFRASTRUCTURE**

### **1.1 Introduction**

In his State of the Nation Address in February 2002, the President said:

*"We must ensure that enough classrooms are built in the shortest possible time to ensure that no students have to learn under trees or in the open air. The provision of enough classrooms and basic furniture, equipment and learning materials and the availability of water and toilets at all our schools are necessary to bring about fairness to all students. It is also important that each teacher should have a classroom to ensure that no classes are held under trees or that learners are crammed into available classrooms. A shortage of classrooms makes it impossible for schools to use their teachers appropriately and it leads to unpleasant learning and teaching conditions, sometimes even conditions which makes learning and teaching almost impossible."*

Immediately after the President's State of the Nation Address in February 2002 in Parliament, Professor Kader Asmal, Minister of Education, MP, instructed Provinces that situations where children are learning under trees, in the open air or in unacceptable structures should be prioritised. The Minister's instruction was that these situations should be eliminated within the shortest possible time. He requested Provincial Education Members of the Executive Council responsible for Education (MECs) to submit to him the business plans of their Departments for school infrastructure delivery for the next three years. The Minister specified that these business plans had to include a detailed plan with clear time frames to eliminate all instances where lessons are conducted under trees or in the open air because of a shortage of classrooms. These business plans were all received.

The report presents an analysis of the provincial capital investment business plans for the period 2002/03 to 2004/05, an analysis infrastructure backlogs, and highlights progress made in addressing school infrastructure backlogs.

## 1.2 Analysis of the Provincial Education Capital Investment Business Plans for the period 2002/03 to 2004/05

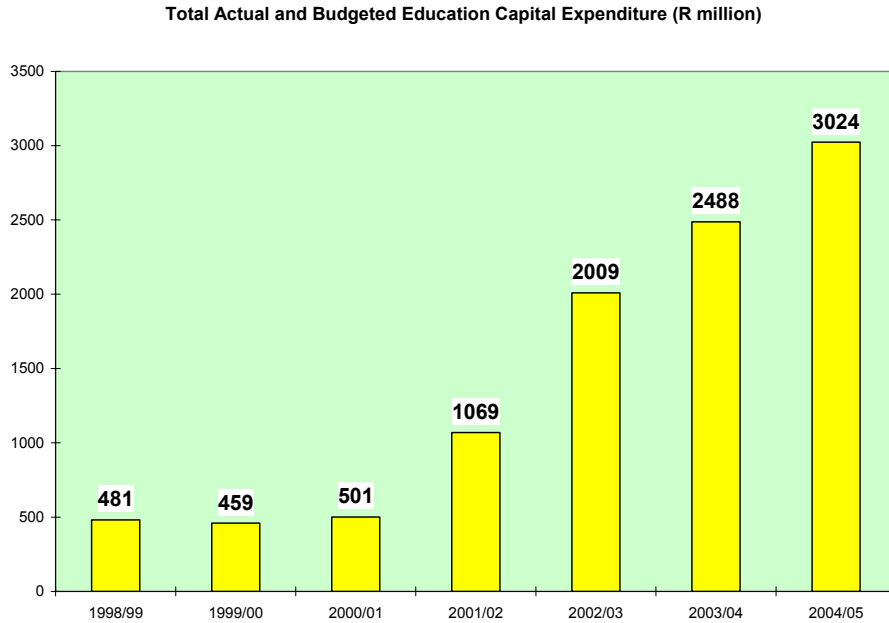
Whereas education capital budgets were on average R480 million during the period 1998/99 to 2000/01, drastic increases in allocations were made for the current MTEF period. These increases are evidence of Government's commitment to improving school infrastructure delivery and to addressing school infrastructure backlogs. Table 1.1 and Figure 1.1 show the increases in education capital budgets from 1998/99 to 2004/05.

**Table 1.1: Actual and Estimates of Education Capital Expenditure: 2001/02 - 2004/05 (R million)**

R million	2001/02		2002/03	2003/04	2004/05	% Growth rates: Estimated actual	
	Adjusted budget	Estimated actual	Budget	Forward	Estimates	2001/02-2002/03	2001/02-2004/05
Eastern Cape	276	206	406	422	764	96.6%	54.7%
Free State	116	59	144	155	206	142.8%	51.4%
Gauteng	253	191	405	503	519	112.4%	39.7%
KwaZulu-Natal	265	307	520	775	822	69.2%	38.8%
Limpopo	112	97	238	287	330	146.1%	50.5%
Mpumalanga	97	93	150	164	178	61.3%	24.4%
Northern Cape	2	2	12	17	19	428.1%	102.1%
North West	91	62	115	145	165	84.9%	38.4%
Western Cape	55	51	20	20	21	-61.8%	-26.3%
<b>Total</b>	<b>1 267</b>	<b>1 069</b>	<b>2 009</b>	<b>2 488</b>	<b>3 024</b>	<b>87.90%</b>	<b>41.40%</b>

The above information also shows a marked increase of the growth rates of the infrastructure budgets.

**Figure 1.1: Actual and Estimates of Education Capital Expenditure: 2004/05 (R million)**



### **1.3 Infrastructure backlog analysis**

The Department of Education has done a crude backlog analysis based on the School Register of Needs 2000 database. All facilities provided since 2000 were deducted from the backlogs as recorded in 2000. The analysis is somewhat crude, since more detailed analyse should be done on a school-by-school basis. The estimated costs were based on the average costs to provide the various infrastructure components indicated in the Provincial Education Capital Business Plans for the 2002/03 to 2004/05 MTEF periods and are shown in Table 1.2.

**Table 1.2: Average cost per infrastructure component on which the backlog cost estimation is based**

<b>Budget item</b>	<b>Unit cost (R'000)</b>	<b>Comment / Quantity</b>
<b>Classroom</b>	100	As required
<b>Water Supply</b>	100	As required

<b>Toilets</b>	15	As required
<b>Administration Block</b>	400	One
<b>Laboratories</b>	250	Two per secondary school
<b>Libraries</b>	250	One per school
<b>Minor Repairs</b>	100	Maintenance
<b>Major renovations</b>	750	Schools in weak conditions
<b>Fence</b>	200	No or poor condition fences
<b>Electricity per school</b>	65	As required
<b>Telephones per school</b>	1	As required

The calculated backlogs in infrastructure components and estimated cost to eliminate these backlogs are shown in Table 1.3 and Table 1.4.

**Table 1.3: Estimated backlog costs at end of 2001/2002 financial year**

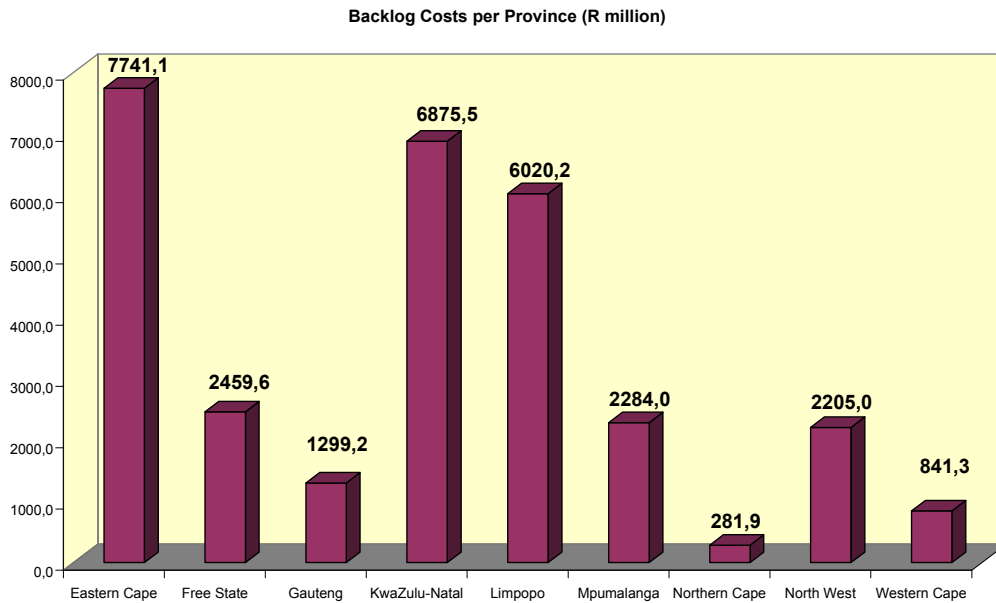
Province	Total cost @ R100 000 per classroom R' million	Total cost @ R100 000 per water connection R' million	Total cost @ R15 000 per toilet	Total cost @ R400 000 per administration block	Total cost @ R250 000 per laboratory	Total cost @ R300 000 per library	Total cost @ R100 000 for minor repairs and renovations	Total cost @ R750 000 for major repairs and renovations	Total cost @ R200 000 per fence	Total cost @ R650 000 per electricity connection	Cost of telephone connection @ R1 000	Total cost	Provincial share of backlogs (%)
Eastern Cape	1,387,400,000	254,400,000	572,190,000	1,433,200,000	346,500,000	1,698,900,000	211,000,000	974,250,000	614,600,000	246,090,000	2,569,000	<b>7,741,099,000</b>	<b>25.8%</b>
Free State	126,400,000	74,700,000	167,265,000	557,600,000	47,500,000	639,600,000	142,200,000	459,000,000	169,400,000	74,880,000	1,029,000	<b>2,459,574,000</b>	<b>8.2%</b>
Gauteng	197,300,000	12,800,000	240,885,000	47,600,000	54,750,000	320,100,000	115,700,000	234,000,000	66,400,000	9,620,000	94,000	<b>1,299,249,000</b>	<b>4.3%</b>
KwaZulu-Natal	957,800,000	168,700,000	616,905,000	758,000,000	569,250,000	1,372,200,000	281,800,000	1,422,000,000	515,800,000	211,185,000	1,863,000	<b>6,875,503,000</b>	<b>22.9%</b>
Limpopo	773,500,000	157,100,000	544,215,000	864,800,000	617,000,000	1,225,800,000	171,900,000	1,176,750,000	351,400,000	135,590,000	2,166,000	<b>6,020,221,000</b>	<b>20.1%</b>
Mpumalanga	602,700,000	66,300,000	231,705,000	147,600,000	113,500,000	460,200,000	70,600,000	415,500,000	117,200,000	57,785,000	875,000	<b>2,283,965,000</b>	<b>7.6%</b>
Northern Cape	20,400,000	600,000	21,630,000	30,800,000	10,250,000	92,100,000	27,900,000	54,750,000	20,400,000	2,990,000	40,000	<b>281,860,000</b>	<b>0.9%</b>
North West	139,500,000	37,700,000	204,975,000	235,600,000	81,500,000	564,600,000	111,900,000	629,250,000	145,800,000	53,170,000	983,000	<b>2,204,978,000</b>	<b>7.3%</b>
Western Cape	88,300,000	12,500,000	16,815,000	35,200,000	79,750,000	200,100,000	90,200,000	242,250,000	70,200,000	4,680,000	1,344,000	<b>841,339,000</b>	<b>2.8%</b>
<b>TOTAL</b>	<b>4,293,300,000</b>	<b>784,800,000</b>	<b>2,616,585,000</b>	<b>4,110,400,000</b>	<b>1,920,000,000</b>	<b>6,573,600,000</b>	<b>1,223,200,000</b>	<b>5,607,750,000</b>	<b>2,071,200,000</b>	<b>795,990,000</b>	<b>10,963,000</b>	<b>30,007,788,000</b>	<b>100.0%</b>

**Table 1.4: NUMBER OF INFRASTRUCTURE COMPONENTS NEEDED TO ELIMINATE EXISTING BACKLOGS**

Province	Present Classroom Shortages	Number Of Schools Without Water	Toilet Shortages	Number Of Schools Without Administration Blocks	Shortages Of Laboratories	Number Of Schools Without Libraries	Number Of Schools In Need Of Minor Repairs And Renovations	Number Of Schools In Need Of Major Repairs And Renovations	Number Of Schools In Need Of Fencing	Number Of Schools Without Electricity	Number Of Schools Without Telephones
Eastern Cape	13874	2544	38146	3583	1386	5663	2110	1299	3073	3786	2569
Free State	1264	747	11151	1394	190	2132	1422	612	847	1152	1029
Gauteng	1973	128	16059	119	219	1067	1157	312	332	148	94
KwaZulu-Natal	9578	1687	41127	1895	2277	4574	2818	1896	2579	3249	1863
Limpopo	7735	1571	36281	2162	2468	4086	1719	1569	1757	2086	2166
Mpumalanga	6027	663	15447	369	454	1534	706	554	586	889	875
Northern Cape	204	6	1442	77	41	307	279	73	102	46	40
North West	1395	377	13665	589	326	1882	1119	839	729	818	983
Western Cape	883	125	1121	88	319	667	902	323	351	72	1344
TOTAL	42933	7848	174439	10276	7680	21912	12232	7477	10356	12246	10963

The cost of addressing all school infrastructure backlogs, which remained at the end of the 2001/02 financial year is shown according to Province in Figure 1.2.

**Figure 1.2: Cost of addressing school infrastructure backlogs**



The provincial percentage share of the MTEF education capital budget compared to the provincial share of the backlogs is shown in Figure 1.3.

**Figure 1.3: Provincial percentage share of the MTEF capital budget versus percentage share of backlogs**

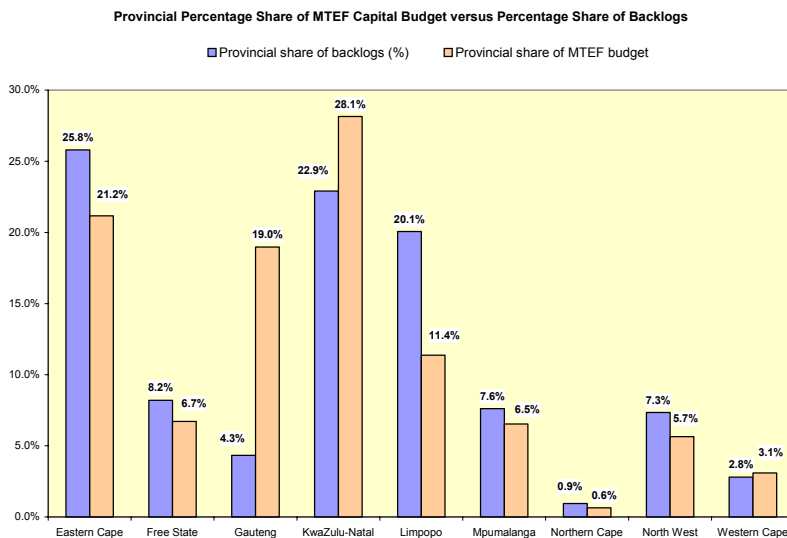


Figure 1.3 shows that in all provinces except Limpopo, the allocations made for education capital developments and maintenance are in line with the share of the backlogs. In Limpopo the percentage share of the MTEF budget (11,4%) is much lower than Limpopo's share of the backlogs (20,1%). There is thus room for improvement in the allocation made for education capital investments for the Limpopo Province. Gauteng made a very favourable allocation for education capital investments (19% of the total MTEF education capital budget) compared to their share of the backlogs (4,3%). This is largely influenced by Gauteng's programme to install computers in all their schools.

In order to address very basic infrastructure backlogs including classrooms, water, sanitation as well as renovations of dilapidated school buildings, the budgets needed per province are given Table 1.5

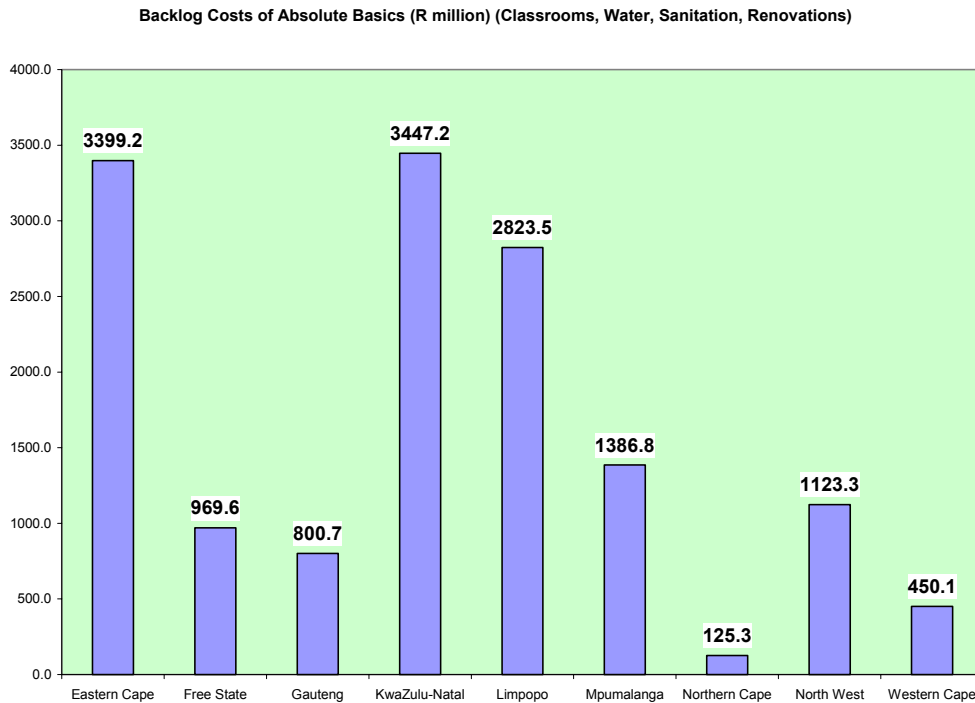
5.

**Table 1.5: School infrastructure backlog costs of absolute basics**

<b>PROVINCE</b>	<b>Provincial share of backlogs (%)</b>	<b>Provincial share of MTEF budget</b>	<b>MTEF budget (R million)</b>	<b>Backlog Costs of Absolute Basics (R million)</b>	<b>MTEF Budget as Percentage of Backlog costs of absolute basics</b>
<b>Eastern Cape</b>	25.1%	21.2%	1592	3399.2	46.8%
<b>Free State</b>	8.0%	6.7%	505	969.6	52.1%
<b>Gauteng</b>	5.6%	19.0%	1427	800.7	178.2%
<b>KwaZulu-Natal</b>	22.8%	28.1%	2117	3447.2	61.4%
<b>Limpopo</b>	18.7%	11.4%	855	2823.5	30.3%
<b>Mpumalanga</b>	7.7%	6.5%	492	1386.8	35.5%
<b>Northern Cape</b>	1.0%	0.6%	48	125.3	38.3%
<b>North West</b>	7.3%	5.7%	425	1123.3	37.8%
<b>Western Cape</b>	3.7%	0.8%	233	450.1	13.6%



**Figure 1.4: School infrastructure backlog costs of absolute basics**



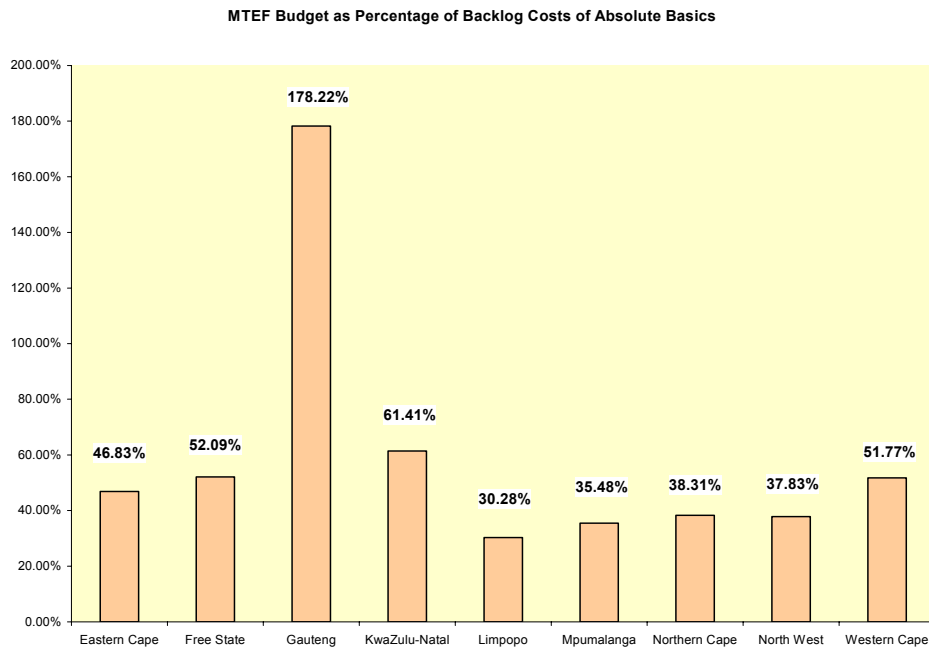
Even if the full MTEF budgets were used to address these basic backlogs, only the Western Cape and Gauteng would be able to fully eliminate all these backlogs. The MTEF budgets of the other Provinces would only enable them to address a small percentage of their basic backlogs should they direct their full MTEF budgets to classrooms, water, sanitation and renovations. Selecting schools without electricity and then calculating backlog costs shown in Table 1.6 and Figure 1.5 illustrate the point.

**Table 1.6: MTEF Budget as Percentage of Backlog Costs of Absolute Basics**

Province	Number of schools without electricity	Cost of shortage @ R65000,00 per school electricity for R' million	Backlog costs of absolute basics R' million	MTEF budget R' million	MTEF as % of backlogs
Eastern Cape	3786	246.1	3399	1592	46.8%
Free State	1152	74.9	970	505	52.1%
Gauteng	148	9.6	801	1427	178.2%

KwaZulu-Natal	3249	211.2	3447	2117	61.4%
Limpopo	2086	135.6	2823	855	30.3%
Mpumalanga	889	57.8	1386.8	492	35.5%
Northern Cape	46	3.0	125.3	48	38.3%
North West	818	53.2	1123.3	425	37.8%
Western Cape	72	4.6	450.1	233	51.8%

**Figure 1.5: MTEF Budget as Percentage of Backlog Costs of Absolute Basics**



The percentages for the following provinces are worth noting: Eastern Cape – 46,8%; Free State – 52,1%; KwaZulu-Natal – 61,4 %; Limpopo – 30,3%; Mpumalanga – 35,5%; Northern Cape – 38,3%; and North West – 37,8%.

#### **1.4 Provincial plans for reducing classroom backlogs in the next three years**

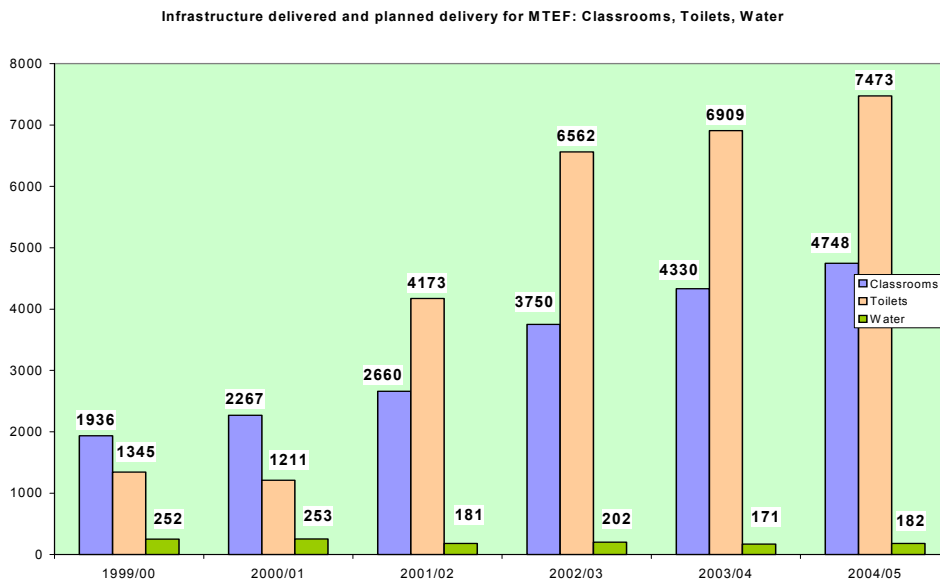
At the end of the 2001/02 financial year: 42 933 classrooms; 7 848 schools needed water; 174 439 toilets; 10 276 administration blocks; 7 680 laboratories; 21 912 libraries; 12 232 schools needed minor repairs and renovations; 7 477 schools needed major repairs and renovations; 10 356 schools needed fencing; 12 246 schools needed electricity; and, 10 963 schools needed telephones. The total estimated cost to address all these backlogs is R 30 billion.

According to the Provincial Business Plans, an estimated total of 12 828 classrooms will be built during the period 2002/03 to 2004/05, if everything goes according to plan. The planned number of facilities (classrooms, toilets and water) that were built in the period 1999/00 to 2001/02 together with those to be built in the MTEF period 2002/03 to 2004/05 is shown in Table 1.7 and Figure 1.6.

**Table 1.7: Numbers of Actual and Planned Delivery on Priorities: 1999/00 to 2004/05 financial year**

Facility	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05
Classrooms	1936	2267	2660	3750	4330	4748
Toilets	1345	1211	4173	6562	6909	7473
Water	252	253	181	202	171	182

**Figure 1.6: Numbers of Actual and Planned Delivery on Priorities: 1999/00 to 2004/05**

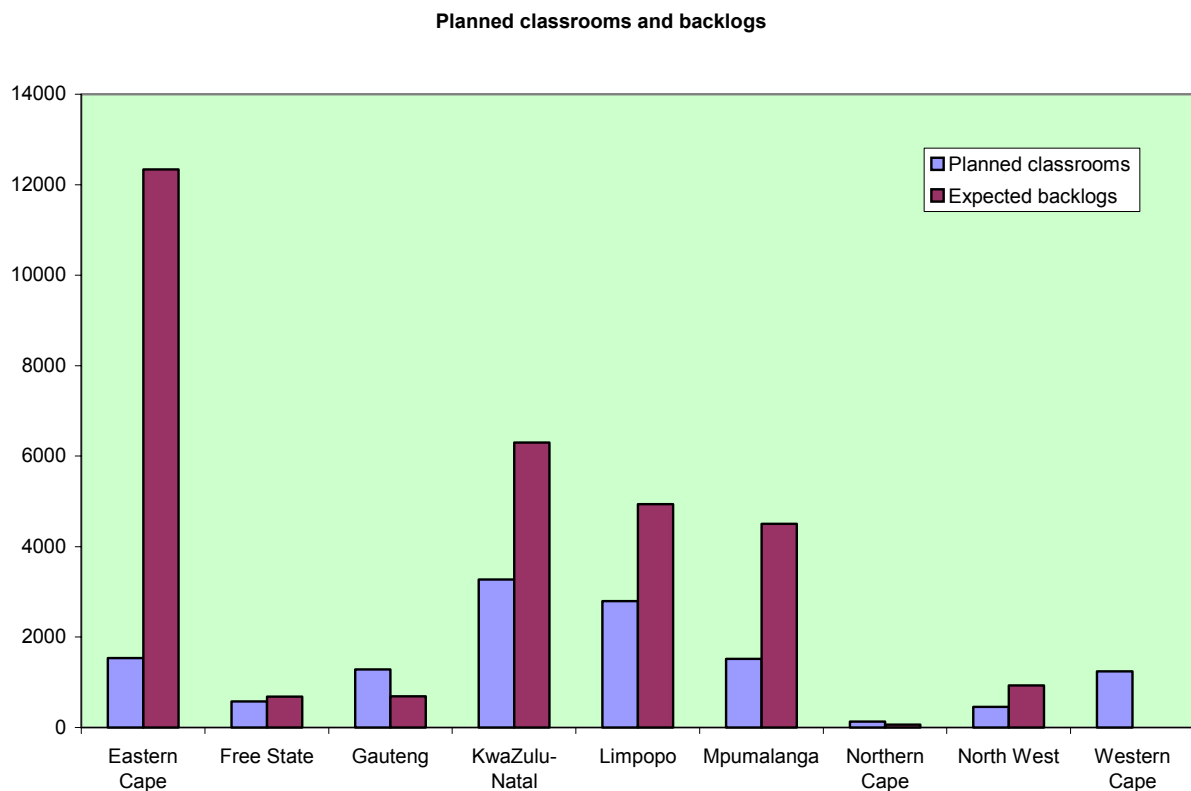


The planned number of classrooms that will be built during the MTEF period per province is shown in Table 1.8 and Figure 1.7.

**Table 1.8: Planned classrooms and expected backlogs in MTEF period**

Province	Classrooms	Backlogs
Eastern Cape	1536	12338
Free State	580	684
Gauteng	1283	690
KwaZulu-Natal	3276	6303
Limpopo	2796	4939
Mpumalanga	1519	4508
Northern Cape	135	69
North West	461	934
Western Cape	1242	0
<b>Total</b>	<b>12828</b>	<b>30465</b>

**Figure 1.7: Planned classrooms and expected backlogs in MTEF period**



From the above information it appears that the Western Cape expects to have eliminated all backlogs while Gauteng will have reduced its backlog. The remaining provinces will still have significant backlogs compared to available classrooms. The

Eastern Cape, KwaZulu-Natal, Limpopo Mpumalanga and the North West still have much work to plan for.

#### **1.5 Addressing situations where learners are receiving education under trees or outside in the next three years**

In the business plans, the Western Cape, Northern Cape, Gauteng, and North West Provinces indicated that they are not aware of any situations where a school was without a building. Mpumalanga provided the Minister with a list of schools experiencing overcrowding and where learners would receive education outside from time to time. Mpumalanga Province has 213 such schools. At 60 of these schools there is a total shortage of 404 classrooms. Mpumalanga reported that the remaining 153 schools with 1157 classrooms are housed in unacceptable structures. Mpumalanga Province indicated that they have prioritised these schools for immediate attention.

The Free State reported to the Minister that there was only one school where learners were receiving education under trees namely Caledonpark in Ficksburg. The Province erected two pre-fabricated classrooms, which solved the problem. The Free State reported that they had 30 schools, which are housed in unacceptable structures. These schools have been prioritised within the MTEF period. The total estimated cost to upgrade the facilities of these 30 schools to acceptable standards is R4 925 521,00. The Free State also indicated that the proposed 23 new schools and additional facilities at 21 schools planned for the current MTEF cycle 2002-2005 would not receive attention during the next financial year due to budget constraints.

KwaZulu-Natal, Eastern Cape and Limpopo Departments of Education submitted business plans with lists of planned projects to the Minister of Education. These schools have been prioritised according to the extent of overcrowding experienced at the schools.

Taking into account the huge numbers of classroom shortages it will not be possible to eliminate overcrowding at all schools in the country within the MTEF period, since

Provincial MTEF allocations for school infrastructure development are still not adequate.

In terms of the current analysis of the business plans reported here and the size of the expected school infrastructure backlogs, Provinces will be able to eliminate situations where learners are physically outside, but they will not be able to eliminate all other situations of overcrowding. Provinces have been requested to address the most critical situations first. These would be where there are no facilities, where learners are physically outside and where learners are receiving education in absolutely unacceptable conditions such as in toilets

At the CEM meeting on 25 November 2002, held in Port Elizabeth the elimination of situations where learners are studying under trees or outside was discussed again. The following guidelines were presented:

It was recommended that the situations of “learners under trees” should be categorised in the following order of priority:

- Learners physically outside as a result of the absence or shortage of classrooms;
- Learners receiving education under highly unacceptable conditions such as classes within passages, within toilet buildings, et cetera;
- Learners within unacceptable structures such as shelters; and,
- Learners within overcrowded classrooms.

The provincial MECs were provided with a list of schools where the above-mentioned situations were recorded in the School Register of Needs database. Provinces were requested to indicate which schools have been dealt with since the School Register of Needs update in 2000 and to add any schools which were experiencing similar conditions, but which were not on the list. It was recommended that the revised list of schools need to move to the top of the priority list and that, all of these schools must be included in the provincial capital business plans for the 2003/04 financial year. The Minister would request quarterly reports on progress with addressing these situations. During the 2004/05 financial year provinces would deal with any outstanding or new situations which might have arisen.

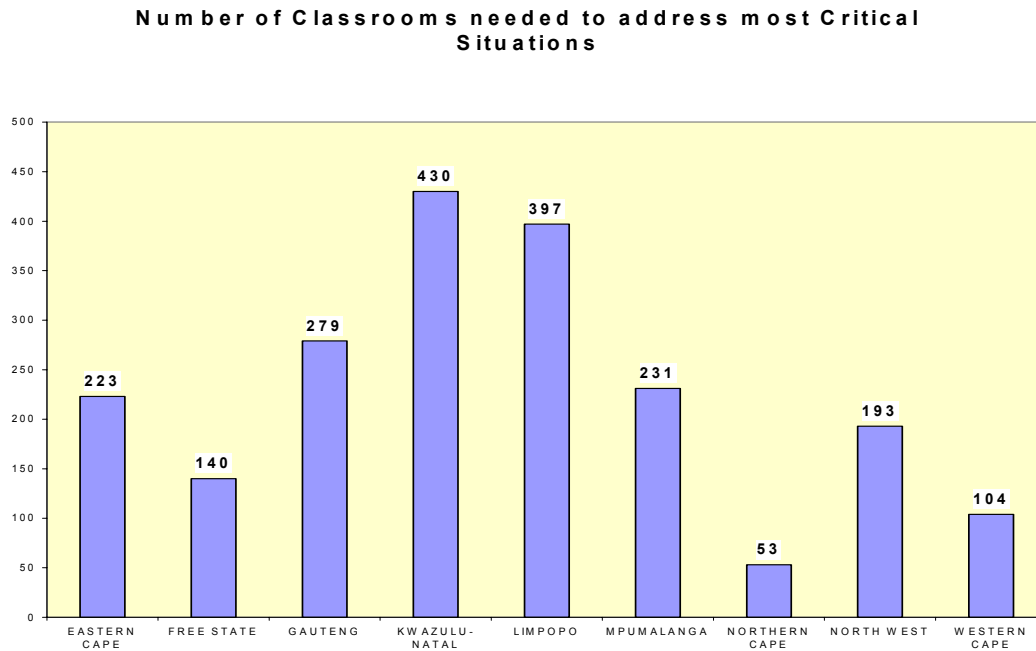
Table 1.9 shows the number of classes per province where learners are taught in halls, offices, staff rooms, passages, outside, shelters, and in other structures (busses, toilet buildings, et cetera).

**Table 1.9: Number of classes per province where learners are accommodated in structures other than classrooms.**

Province	Hall	Offices	Staff room	Store Rooms	Passages	Outside / Under Trees	Shelters	Other	Total
Eastern Cape	270	82	153	106	20	73	3110	130	<b>3944</b>
Free State	165	75	46	76	10	19	319	111	<b>821</b>
Gauteng	289	134	103	175	37	57	392	185	<b>1372</b>
KwaZulu-Natal	1107	277	218	179	20	195	1226	215	<b>3437</b>
Limpopo	392	153	152	156	25	250	2572	122	<b>3822</b>
Mpumalanga	282	173	100	121	138	93	0	0	<b>907</b>
Northern Cape	54	60	23	53	7	12	51	34	<b>294</b>
North West	339	106	87	96	21	41	402	131	<b>1223</b>
Western Cape	157	38	37	53	20	15	141	69	<b>530</b>
<b>Total</b>	<b>3055</b>	<b>1098</b>	<b>919</b>	<b>1015</b>	<b>298</b>	<b>755</b>	<b>8213</b>	<b>997</b>	<b>16350</b>

To address the needs described by Table 1.9, a large number of classrooms have to be built. Figure 1.9 shows the number of classrooms needed to address the most critical situations. These are the number of classes currently being conducted in passages, outside or under trees and in structures such as toilet buildings, in busses, et cetera.

**Figure 1.8: number of classrooms needed to address the most critical situations**

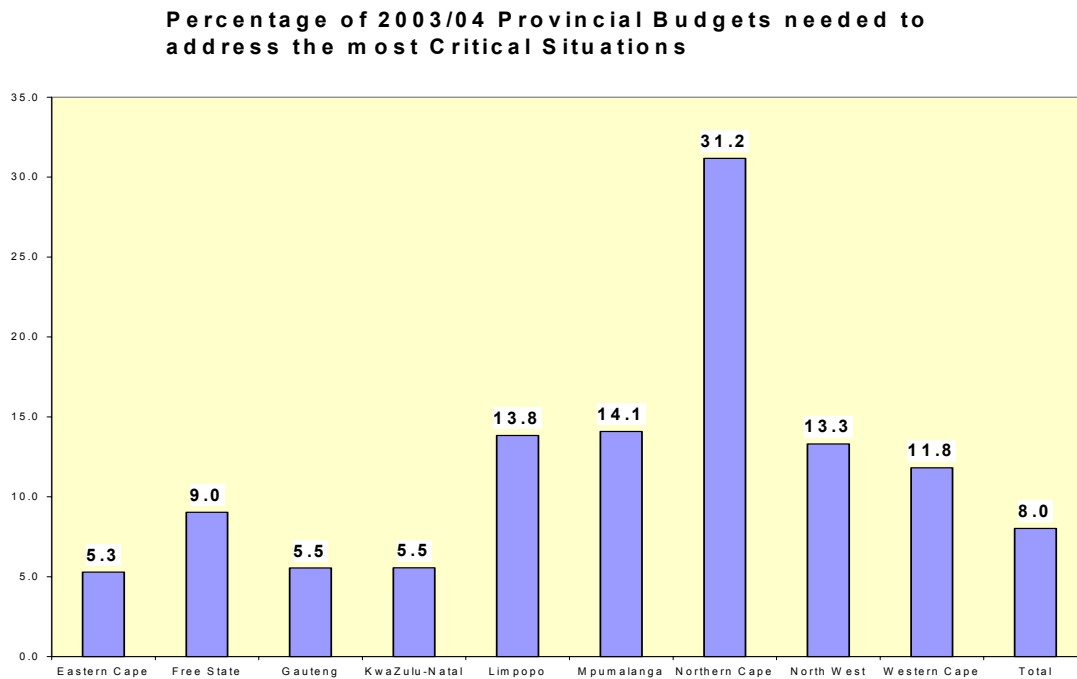


According to the information obtained from the Schools Register of Needs database a total of 2050 classrooms are needed to eliminate the most critical situations. At an average cost of R100 000,00 for the building of a classroom, an amount of R20,5 million is needed to address these situations.

Figure 1.9 shows the percentage of the provincial budgets for the 2003/04 financial year which will be needed to address the most critical situations.



**Figure 1.9: Percentage of 2003/04 Provincial Budgets needed to address the most Critical Situations**



It will thus be possible for Provincial Departments of Education to achieve the objective of eliminating situations where learners are receiving education physically outside or where learners are receiving education under highly unacceptable conditions such as classes within passages, toilet buildings, et cetera.

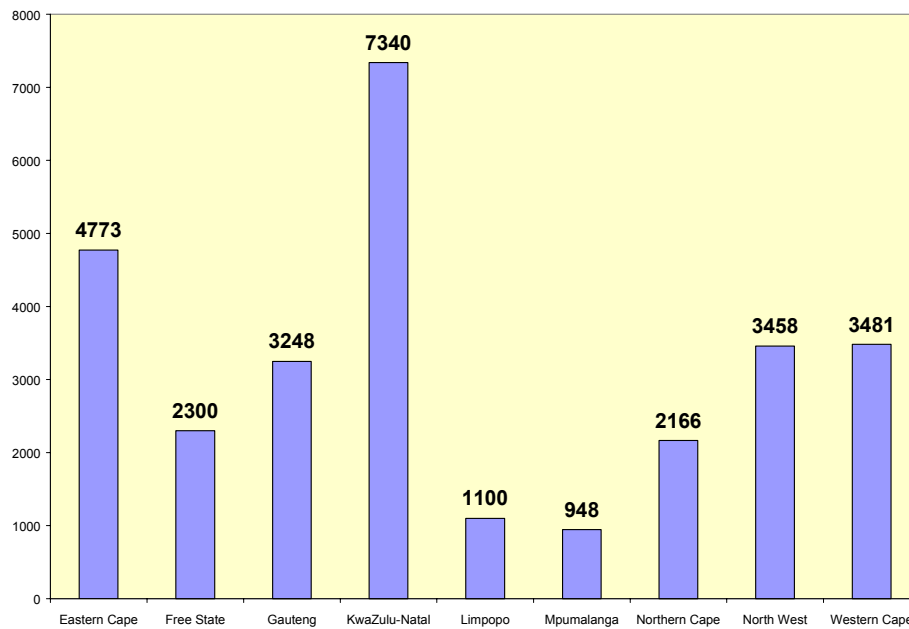
### **1.8 Factors contributing to the apparent classroom shortages**

Provincial Departments of Education report that in various instances unemployed teachers, who establish schools without following proper procedures, have aggravated the problem of learners studying outside. Learners are collected from nearby schools, and the media is then used to place pressure on Provincial Departments of Education to establish schools.

In some instances Provincial Departments of Education could address a portion of the problem by providing transport systems to take learners without adequate infrastructure to existing nearby under-utilised schools.

Another contributing factor to the apparent insufficient infrastructure is the rapid and increased migration and commuting of learners to other areas leaving more and more classrooms empty in especially rural and township areas and thereby increasing the shortage in urban areas. Figure 1.10 shows the estimated number of classrooms, which have become empty as a result of migration, commuting and declining enrollments:

**Figure 1.10: Classrooms not utilized as a result of migration and commuting**

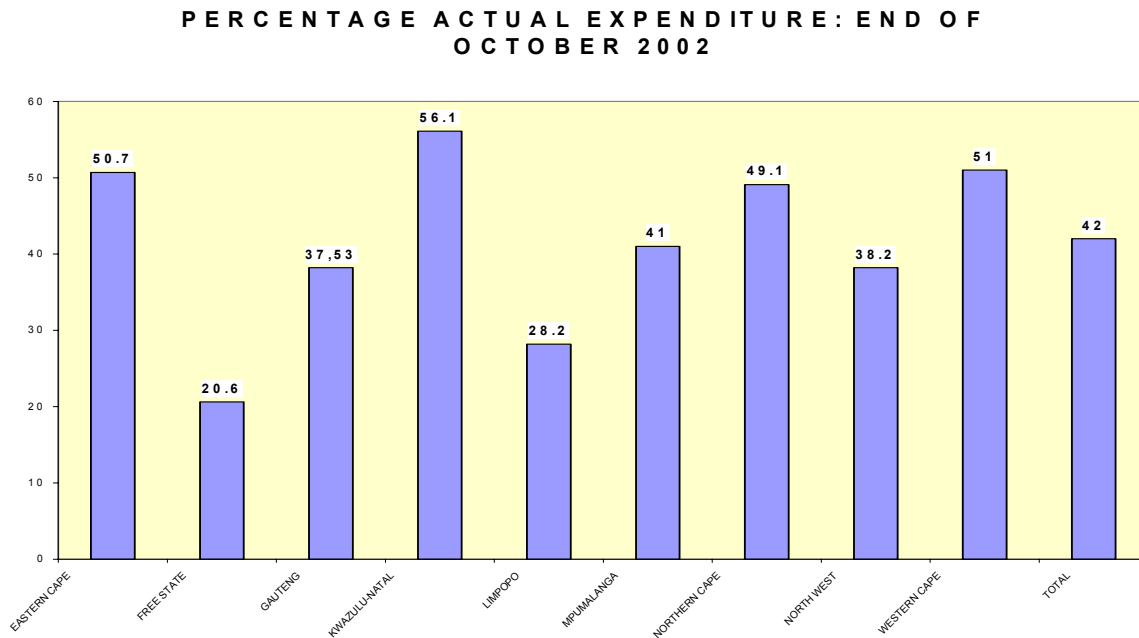


It is interesting to observe that a total of 28 814 classrooms are estimated to be empty as a result of migration, commuting and declining enrollments. The estimated classroom backlog calculated on a school-by-school basis is 42 933.

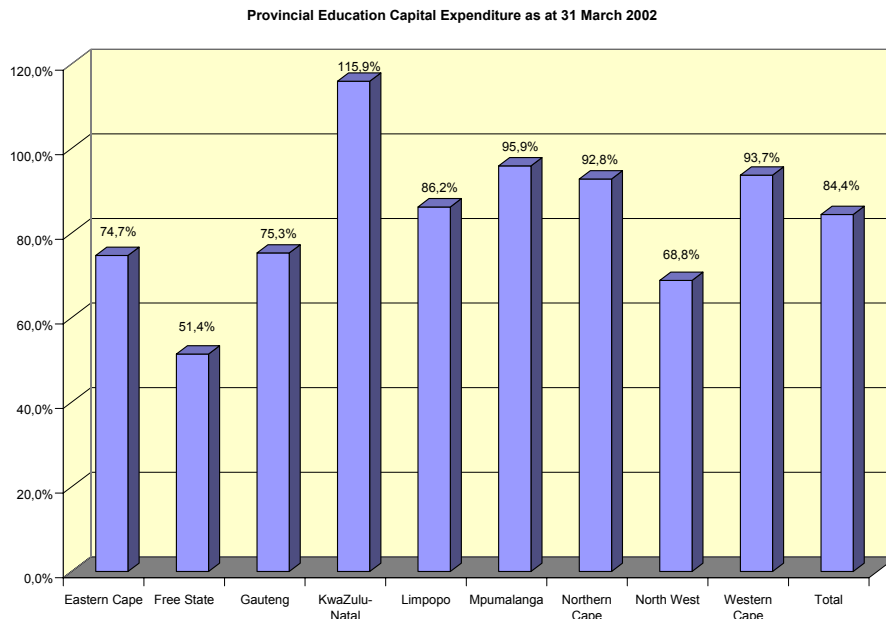
## 1.9 Current Expenditure

The Department of Education monitors provincial expenditure on infrastructure development on a regular basis. Figure 1.11 shows the percentage actual expenditure of education capital budgets as reported by Provincial Departments of Education at the end of October 2002.

**Figure 1.11: Percentage actual expenditure at end of October 2002**



The reported expenditures for the Free State (20,6%) and for the Limpopo Province (28,2%) are very concerning. Both provinces claim that the low expenditures are the result of late implementation by the respective provincial Departments of Works. The average expenditure for all provinces was 42% at the end of October 2002, which is in line with the expected rate of expenditure at this point in time. Capital expenditure normally increases rapidly towards the end of the financial year. This is illustrated by the final audited expenditure figures for education capital investments for the 2001/02 financial year shown in Figure 1.12.



## 1.9 Challenges facing provincial departments of education

The following challenges with regard to school infrastructure delivery in the current financial year have been reported by some of the Provincial Departments of Education:

- KwaZulu-Natal reported that the Provincial Treasury placed a moratorium on the awarding of tenders with a value of more than R200 000,00 from 1 June 2002. The Director-General followed this problem up with the Province. The moratorium was lifted recently, but it affected the awarding of tenders for capital projects, which are mostly more than R200 000,00 per project. According to the KwaZulu-Natal Department of Education, implementation of projects was proceeding much faster than expected before the moratorium, and a high expenditure of the education capital budget is still expected for the current financial year.
- Gauteng reported on the poor quality of work and performance of emerging contractors. They reported that emerging contractors are delivering inferior projects, use inferior materials, do not complete projects, and, cannot provide financial guarantees. Some emerging contractors take a proportion of the fee once a project has been awarded and then sub-contract the work to other

contractors. In some instances sub-contractors are then not paid by the emerging contractors and projects are abandoned. In order to improve delivery by emerging contractors, the Gauteng Department of Education has been on pre-screening contractors, as well as instituting a training programme on financial management for emerging contractors. A further challenge was that the existing capacity of the construction industry in Gauteng is saturated, leading to inflated construction costs.

- Limpopo Department of Education complained that although projects for the current financial year were provided to the Limpopo Department of Works during November last year, implementation by the Works Department began very late. This is an ongoing problem in Limpopo Province.
- Mpumalanga Department of Education experienced that in certain areas in Mpumalanga communities have mobilised to prevent contractors continuing with construction. These communities rejected contractors from outside the communities. The problem however is that there are no skilled emerging contractors in those communities.
- The North West Department of Education also complained that the North West Department of Works is running late with implementation, an ongoing problem.

### **1.10 Sanitation**

The Department of Water Affairs and Forestry and the Department of Education jointly initiated a process to develop a National School Sanitation Strategy. The Department of Water Affairs and Forestry is leading the process. A National School Sanitation Draft Discussion Document was developed. This draft document was tabled for review and discussion during a two day national workshop 26 and 27 November 2002. Representatives from the National and Provincial Government Departments, Local Government, Donors, Non-Government Organisations and service providers participated in the Workshop. Experience and insights were drawn from this wide range of stakeholders.

The draft document acknowledged the fact that approaches that focus exclusively on improving and delivering infrastructure are inadequate. A holistic approach to the improvement of sanitation in schools was recommended which includes strategies for long-term sustainability, health and hygiene education and community participation and ownership. Five models for sanitation improvement at schools were presented for discussion. Two models are currently in operation. The one model is the provision of water and sanitation facilities in new schools by Provincial Departments of Education. The second model refers to the provision of sanitation facilities in schools which are being refurbished by the Provincial Departments of Education. The third model refers to the community sanitation programme which is being implemented by the Department of Water Affairs and Forestry and which should include sanitation provision to schools where community sanitation programmes are being implemented. The fourth model refers to the provision of sanitation facilities by Local Government. The fifth model is currently not being implemented by any particular sphere of Government, other than provincial departments of education, and refers to the elimination of backlogs in sanitation provision to schools.

The workshop recommended that:

- The Department of Education continues with the provision of sanitation and water to new schools and schools which are being refurbished.
- The Department of Water Affairs and Forestry and the Department of Education continues to work together towards improving water and sanitation in schools. The Department of Education should take the leading role for this initiative.
- Dedicated funding is made available and ring-fenced by Treasury to address community and stand alone models on an annual basis. The Department of Education should be in charge of and control this funding.
- District and Provincial Sanitation Task Teams (DSTT & PSTT) capacities must be strengthened.
- The management levels of the Departments of Education and the Department of Water Affairs and Forestry must be brought on board.

- The Department of Education and the Department of Water Affairs and Forestry must jointly drive and champion this process.
- The Department of Water Affairs and Forestry will review the draft document in line with the above-mentioned recommendations, and will present the revised document to all stakeholders.

The implementation of the strategy and delivery is envisaged to commence in the new financial year (2003/2004). The stakeholders acknowledged the need for integrated planning to carry out the mandates of Government. It was acknowledged that school sanitation is more than just an infrastructure problem. It is also a health issue, which requires a political commitment at National and Provincial level to give it greater priority.

#### **1.11: Electrification of Schools**

Based on the National Electrification Strategy, the Department of Minerals and Energy has taken responsibility for the elimination of backlogs in school electrification. ESKOM has been appointed as the implementing agency and works in close collaboration with the national and provincial Departments of Education to ensure the successful implementation of the programme.

The number of schools according to urban/rural classifications electrified until the end of October during the 2002/03 financial year is shown in Table 1.10.

**Table 1.10: Number of schools electrified by end of October 2002**

<b>Province</b>	<b>Deep Rural</b>	<b>Rural</b>	<b>Peri-Urban</b>	<b>Urban</b>	<b>Total</b>
<b>Eastern Cape</b>		202			<b>202</b>
<b>Free State</b>	2	30			<b>32</b>
<b>Gauteng</b>		1	8	2	<b>11</b>
<b>KwaZulu-Natal</b>		186			<b>186</b>
<b>Limpopo</b>		119	2		<b>121</b>
<b>Mpumalanga</b>	1	13	7		<b>21</b>

<b>North West</b>		120	18		<b>138</b>
<b>Northern Cape</b>		2			<b>2</b>
<b>Western Cape</b>	1	3			<b>4</b>
<b>Total</b>	<b>4</b>	<b>676</b>	<b>35</b>	<b>2</b>	<b>717</b>

Nationally, 717 schools were electrified during the current financial year. The expenditure at the end of October 2002 was R22,783 million from a total allocation of R59 million. A total of 244 560 people benefited from the Schools and Clinics Electrification Programme during 2002. In total 7 397 rooms were internally wired as part of the Schools and Clinics Electrification Programme. To date a total of R13,571million has been spent in the Development Nodes of which R7,97 million was in the Urban Nodes and R5,601million in Rural Nodes.

The amount available for the electrification of schools from the National Electrification Fund for the 2003/04 financial year is R101 million. Based on existing backlogs in the electrification of schools the available budget has been allocated as shown in Table 1.11.

**Table 1.11: Budget allocation by province for school electrification for the 2003/04 financial year**

<b>Province</b>	<b>Allocation for 2003/04 R'million</b>	<b>Percentage</b>
Eastern Cape	19.8	19,68%
Free State	15.1	14,95%
Gauteng	1.3	1,25%
KwaZulu-Natal	18.5	18,33%
Mpumalanga	16.9	16,70%
North West	9.4	9,21%
Northern Cape	3.5	3,51%
Limpopo	15.1	14,97%
Western Cape	1.4	1,40%
<b>Total</b>	<b>101</b>	<b>100%</b>



The Minister of Education requested the Minister of Minerals and Energy earlier this year to investigate the possibility of special tariffs for schools. Following this request a task team with representatives from the Department of Education and the Department of Minerals and Energy has been established to investigate the feasibility of the request

As a result a proposal was submitted to Eskom management which recommended that all single phase 60 Amp school and clinic customers be converted from Landrate 4 to Homelight 1. The implications are that the monthly basic charges of R107,00 will no longer be applicable. Tariffs will only increase from 42,10c/kWh to 45,10c/kWh. No deposit would be required if a pre-paid meter is installed. The above-mentioned conversion will have no cost implications for the Departments of Education. If approved by Eskom, this will have huge cost savings for schools supplied with electricity by Eskom, including most rural schools. Similar recommendations will be made to Local Government for consideration for schools supplied with electricity by municipalities and metropolitan councils.

#### **1.11 Poverty Relief, Infrastructure Investment and Jobs Summit Project: Thuba Makote (Schools for Community Development)**

During April 2002, the Department of Education embarked on the Thuba Makote Programme, a project funded from the Poverty Relief, Infrastructure Investment and Jobs Summit Projects Fund and targeted at poor communities. Through this programme 20 multi-functional schools are being developed. A new approach is being developed through this programme that aims to achieve a good school education while making a substantial contribution to community development.

This approach is within a framework that ensures that capital and ongoing resources are stretched by working with partners and by placing structures into place that ensure the sustainability of projects. The programme includes job opportunities for local people in the areas selected for the development of the schools and gives preference to the employment of women, the youth (younger than 25 years) and the disabled. Skills training and skills transfer to the local people and capacity building of the school

community for the effective maintenance and management of the facilities forms part of the programme. Existing infrastructure is upgraded and new infrastructure is designed in such a way that it can be used more efficiently and effectively for education as well as catering for community needs and development.

The first nine schools that are currently under construction are shown in Table 1.12.

**Table 1.12: List of schools under construction under the Thuba-Makote programme**

<b>Province</b>	<b>Name of school</b>	<b>Date of completion</b>
<b>Eastern Cape</b>	Zinyosi Primary School Mt Frere	May 2003
<b>Free State</b>	Boitumelo Sec School Ficksburg	July 2003
<b>Gauteng</b>	Mogale City High School Magaliesburg?	September 2003
<b>KwaZulu-Natal</b>	Machibisa Primary School Edendale	November 2003
<b>Mpumalanga</b>	Jacob Mdhuli Prim School Makoko	March 2003
<b>North West</b>	Dirang ka Natla Prim School, Klerksdorp	July 2003
<b>Northern Cape</b>	Reaipela School Kuruman	June 2003
<b>Limpopo</b>	Thulani Primary School Mkhuhlu	May 2003
<b>Western Cape</b>	Bloekombos Sec School Cape Town	August 2003

Each community has been allocated a budget of R5.3 million. The design phase of the multi-functional schools has been completed and construction of 8 of the nine schools commenced in October 2002. The first school will be completed in March 2003, at which point the programme will be officially launched.

The programme has delivered outstanding dividends in terms of integrated delivery. The Department of Labour is providing skills training for unemployed people in the communities to enable them to participate in the construction of the schools. The school facilities will also be used in future after school hours for skills training programmes by the Department of Labour for community members. SETA funding can be accessed for training unskilled people to enable them to participate in the construction of the schools. The Department of Agriculture participates in the programme by offering training to the school and community members in establishing vegetable gardens at the schools to supplement the learners' nutrition. The Department of Health assists by providing HIV/AIDS training sub-programmes.

Various partnerships with the private sector have developed through this programme. Corobrick donated bricks to some of the schools. Communities in the Northern Cape and Eastern Cape are manufacturing bricks for the building their multi-functional schools.

Community involvement throughout the programme, beginning with the planning and design phase of each of the multi-functional schools, ensures community ownership of the schools. At each school facilities such as workshops, sewing centres, Information Communication Technology Centres, media centres, catering facilities, communication hubs, and craft centres are included which can be used by community members for income generating activities. These schools are built according to new designs, which facilitate outcomes-based education; and with larger sick bays to cater for HIV/AIDS affected learners. In addition to skills training, training is provided for school management, financial management, caring for HIV/AIDS affected community members, SMME development and facility management.

Learners are also involved in the design of these facilities. The design of the Zinyosi School, near Mount Frere in the Eastern Cape is based on design innovations put forward by a competition for the learners of the school. A picture of the scale model of this school is in Figure 1.13.

**Figure 1.13: Scale model of Zinyosi Primary School, Mt Frere. Eastern Cape**



## **1.13 Donor-funded school building programmes**

### *1.13.1 Japanese Grant Aid*

The Department of Education has made remarkable progress with the implementation of the Japanese Grant Aid for School construction. The Japanese Programme involves the building of school infrastructure to the value of approximately R 200 million, which has been divided equally amongst four provinces namely Eastern Cape, KwaZulu-Natal, Limpopo and Mpumalanga.

The basic design studies for the Japanese Grant Aid Programme in the Eastern Cape and KwaZulu-Natal have been completed. The agreements between the two countries for these two provinces were signed in Cape Town on 13 September 2001. The tenders for the actual construction work in the Eastern Cape and KwaZulu-Natal were awarded in Tokyo in January 2002 and actual construction commenced in April 2002. The schools under construction in the two provinces are listed in Table 1.13.

**Table 1.13: Schools under construction under the Japanese Grant Aid in Eastern Cape**

Province	Region	Name of school	No of classrooms	Administration area	Toilet Booths	Rain Water tanks
Eastern Cape	Mt Ayliff	Sigagane	6	1	14	4
		Gillespie	10	1	14	7
		Sipolweni	8	1	14	5
		Sikhemane	9	1	14	6
	Tabankulu	Lower Mnceba	6	1	14	4
		Ngqane	9	1	17	6
	Mt Frere	Hlane	12	1	17	8
		Empendla	12	1	17	8
		Qoqa	7	1	11	5
		Ntibane	7	1	0	5
	Maluti	Mnceba	9	1	14	6
		Lameka	10	1	20	7
		Thabang	6	1	11	4
		Thokozani	6	1	14	4
	Mt Fletcher	Jongisizwe	5	1	14	4
		Fletcherville	11	1	11	7
	Bizana	Bonda	11	1	17	7
		Majazi	15	1	20	10
	Flagstaff	Carnagu	9	1	14	6
	Lusikisiki	Hlabathini	11	1	20	6
Total for Eastern Cape			<b>179</b>	<b>20</b>	<b>287</b>	<b>119</b>

**Table 1.14: Schools under construction under the Japanese Grant Aid in KwaZulu-Natal**

Province	Region	Name of school	No of classrooms	Administration area	Toilet Booths	Rain Water tanks
KwaZulu-Natal	Ubombo	Cezwana	7	1	13	4
		Nibela	12	1	18	8
		Siqakatha	13	1	18	9
		Esiphahleni	6	1	9	4
		Hlokohloko	3	1	9	2
		Mnqobokazi	5	1	9	4

	Inqwavuma	Mfingose	14	1	18	11
		Makhana	4	1	9	3
		Holy Family	11	1	18	8
		Ophondweni	5	1	9	4
		Bhekabantu	12	1	18	8
		Libuyile	9	1	14	7
		Enkulisweni	8	1	13	6
		Thengani	11	1	18	8
		Ekuhleleni	9	1	14	7
		Endabeni	5	1	9	4
		Maphindela	11	1	18	8
		Mengu	7	1	13	4
	KwaZulu-Natal	Inqwavuma	Ntokozweni	9	1	14
		Embadleni	4	1	9	2
		Madeya	5	1	9	4
		Mziki	6	1	9	4
		Sambane	8	1	13	5
		Shemula	6	1	9	4
		St Joseph	9	1	14	7
		Thandizwe	10	1	14	8
		Thelamama	6	1	9	4
<b>Total for KwaZulu-Natal</b>			<b>215</b>	<b>27</b>	<b>347</b>	<b>154</b>

The construction of the Japanese-funded schools in these two provinces will be completed before the end of March 2003.

During the period 1998 to 2000, 370 new classrooms (45 schools) were built in the Eastern Region of the Eastern Cape through the assistance of the first Japanese Grant Aid programme. Under the second phase of the Japanese Grant Aid programme, 179 new classrooms and 287 toilet booths have been built in the Eastern Cape. 119 rainwater tanks are installed. The schools are also fully equipped, furnished and fenced through the programme. The second phase of the programme targets 20 schools in the districts of Mt Ayliff, Tabankulu, Mt Frere, Maluti, Mt Fletcher, Bizana, Flagstaff and Lusikisiki. In KwaZulu-Natal 27 schools in the Ubombo and Ingwavuma districts.

215 new classrooms and 347 toilet booths have been built. 154 Rainwater tanks have been installed at the 27 schools. The schools are also fully equipped, furnished and fenced by the programme. Each school delivered to the communities by the Japanese Government receives a maintenance manual as well as training for minor maintenance work. The progress as well as expenditure is according to planning.

The basic design study for Mpumalanga has been completed and the agreement for the Japanese-funded Mpumalanga School Building Programme was signed on 11 December 2002. The schools in Mpumalanga will be constructed during 2003. The Basic Design Study for the Japanese School Building Programme in Limpopo has been completed. Construction of the Limpopo schools will be completed in 2004.

The schools, which will be upgraded and/or constructed under the Japanese Grant Aid in Mpumalanga and Limpopo, are given in Table 1.13.

**Table 1.15: Schools that will be upgraded and/or constructed under the Japanese Grant Aid in Mpumalanga**

Province	Region	Name of school	No of classrooms	Administration area	Laboratories	Toilet Booths
Mpumalanga	Eerstehoek	Sibanasetfu	11	1	1	10
		Izithandani	17	1		18
	Malelane	Hoechst	15	1		16
		Sifundzekhaya	18	1		19
		Sondlovu	8	1		10

		Ekuphumuleni	16	1		18
	Groblersdal	Slovo	7	1		8
		Ramaphosa	10	1		10
		Lusaka	7	1		8
		Kolofane	10	1	1	10
	KwaMhlanga	Chief Luthuli	8	1		10
		Sinqobile	10	1		10
		Langalibalele	14	1		16
	Moretele	Mmaduma-Moloto	5	1		8
		Refithile	6	1		8
	Standerton	Ikhethelo	12	1	1	11
		M M Motlounq	20	1	1	18
		Isifisosethu	17	1		18
		SS Mshayisa	12	1		12
		Shukuma	9	1		10
<b>Total for Mpumalanga</b>			<b>232</b>	<b>20</b>	<b>5</b>	<b>240</b>

In Mpumalanga, 20 schools will be upgraded and/or constructed through the Japanese Grant Aid Programme. 232 new classrooms, 20 administrative areas, 5 laboratories, and 240 toilet booths will be constructed in the Eerstehoek, Malelane, Groblersdal, KwaMhlanga, Moretele and Standerton Regions

**Table 1.16(a): Schools that will be upgraded and/or constructed under the Japanese Grant Aid in Limpopo**

Province	Region	Name of school	No of classrooms	Administration area	Toilet Booths
<b>Limpopo</b>	Bochum	Dinoko Primary	3	1	6
		Kgopudi Secondary	5	1	10
		Makgotlho Primary	7	1	12
		Mapotla Primary	3	1	7
		Matjeketlane Primary	5	1	10
		Ngoakwana Secondary	4	1	7
		Rapetsoa Secondary	2	1	6
		Rapoho Primary	14	1	20
		Kodumela Primary	3	1	6
		Bothanang Primary	14	1	20



		Sekururwe Combined	10	1	14
	Konekwena	Kwena A Peu Secondary	3	1	6
		Rametlwana Lower Primary	7	1	10
		Mahlabela Secondary	2	1	6
		Ikageleng Primary	7	1	12
		Pula Seopa Primary	12	1	20
		Sefataladi Primary	11	1	17
		Tlou Secondary	3	1	6
		Rapitsi Primary	5	1	10

**Table 1.16(b): Schools that will be upgraded and/or constructed under the Japanese Grant Aid in Limpopo**

Province	Region	Name of school	No of classrooms	Administration area	Toilet Booths	
Limpopo	Konekwena	Kgabo Park Primary	4	1	7	
	Bakenberg	Basterpad Primary	4	1	7	
		Kgakgathu Secondary	7	1	12	
		Kgotsoro Primary	7	1	10	
		Matlou Memorial Primary	6	1	12	
		Moroba Primary	7	1	10	
		Mushi Primary	9	1	14	
		Nkidikittlana Primary	9	1	14	
		Nkontlha Primary	5	1	10	
		Ntebeleleng Primary	4	1	7	
		Thutlane Lower Primary	12	1	20	
		Tlhako Primary	7	1	10	
		Seshoatlha Secondary	7	1	12	
	<b>Total for Limpopo</b>			<b>208</b>	<b>32</b>	<b>350</b>

In Limpopo, 32 schools will be upgraded and/or constructed. 208 new classrooms, 32 administration areas and 350 toilet booths will be constructed in The Bochum, Konekwena, and, Bakenberg Districts.

#### 1.13.2 USAID

The USAID assistance of R35 million for the reconstruction of flood-damaged schools in Limpopo was completed in 2002. Through this assistance 30 flood-damaged schools were renovated and upgraded. The programme provided and repaired classrooms, administrative areas and teacher facilities. Schools were provided with furniture as well as adequate sanitation facilities.

#### 1.13.3 Netherlands Assistance

The Netherlands support programme for flood-damaged schools in the Northern Province amounting to approximately R 15 million is being utilised to repair and reconstruct 11 schools. Completion of renovations and construction work on the Netherlands programme is expected by March 2003.

#### *1.13.4 European Union School Building Programme*

The European Union funded Eastern Cape School Building programme, amounting to assistance of approximately R 65 million for the remaining work to be done under the programme, is being utilised to replace tornado-damaged mud-structure school facilities in the Eastern Cape. Completion of the programme is expected by the end of December 2002. A total amount of R 105,71 million has been received since 1998/1999 for this building programme. The remaining R65 million is currently being spent. There has however been a deviation from the financing agreement with the last phase of the school building programme in the Eastern Cape. This has necessitated an audit of the programme to establish the extent of the deviation and to seek mechanisms to preserve its integrity.

The European Union has made available a further sum of E40 million for a National Department of Education led infrastructure development programme targeting primary and secondary schools in KwaZulu-Natal and Limpopo provinces. The allocation is flexible and makes provision for the appointment of a Project Manager, based in the Department of Education, to assist the provincial departments. Planning will commence in January 2002.

In order to monitor and improve capital investment expenditure in provinces, a system was established for regular reporting of expenditure on capital projects as well as any problem experienced by Provincial Departments of Education to the Department of Education.

#### **1.14 Conclusion**

The information presented above clearly illustrates the backlogs caused by government neglect of schools in rural areas and in townships prior to 1994. It indicates progress with the development of infrastructure during the past MTEF

period, and gives an indication of what the plans are for further developments for the three years during the 2002/03 to 2004/05 financial years. The task is enormous but it is not insurmountable.

The contribution of the Poverty Alleviation Programme, Thuba-Makote, as well as the contribution of the international community is outlined. These interventions complement government's plans to eliminate unacceptable conditions under which learners in under-privileged learners receive education.

## **SECTION2: THE STATE OF READINESS OF PROVINCES TO ADMINISTER THE 2002 EXAMINATIONS**

### **2.1 Introduction**

This section of the report is based on the Department's observations and contributions received from provincial education departments. It covers both the provincial education departments' success in preparing for the 2002 Grade 12 examinations and the actual administration of these examinations

In line with the Minister's responsibilities, the national Department of Education's Monitoring Team visited all provincial departments of education between May and September 2002 to monitor their state of readiness to administer the 2002 senior certificate examinations. Subsequent to these visits the Monitoring Team visited the provincial departments of education again between 14 October 2002 and 29 November 2002 to monitor the actual progress of the examinations.

The Monitoring Team of the Department of Education visited provincial education departments to:

- Establish the level of preparedness of the provincial department of education to conduct the 2002 Senior Certificate Examination; and
- Identify particular needs of each province with a view to providing support, so as to ensure that provinces are fully prepared for the 2002 Senior Certificate Examination.

In addition to the provincial visits by the Monitoring Team, provincial departments of education were requested to supply more information pertaining to the administration of the examinations

The aim of the monitoring exercise that was conducted between May and October/November was to ensure that any shortcomings observed during these visits are followed-up and rectified. A number of issues relating to examinations were discussed under the following headings:

- Organogram/staffing

- Registration/enrollment
- Question papers
- Details with regard to question papers
- Distribution and storage of question papers
- Security
- Conducting of the examinations
- Invigilation
- Timetables
- Examination Centres
- Irregularities
- Marking Process
- Appointment of Markers
- Marking Centres
- Remuneration/Norm time
- Irregularities
- Capture Processing, and Release of Results

One day was set aside for monitoring each of the provinces. Senior members of provincial departments of education attached to the various examination directorates/sub-directorates were interviewed and also accompanied the Monitoring Team to inspect examination facilities.

## **2.2 Staffing**

Unlike previous years, the staff establishments in most provinces were in place. There were however examinations sections in some of the provincial departments that were understaffed. In three of the provinces there were staff shortages.

In Eastern Cape, the organogram for the examination directorate made provision for 90 posts. Only 57 were occupied and 33 were vacant. Permission had not been granted to advertise the posts. The post of Systems Administrator, which is critical to the effective administration of the computer system, was vacant.

In the Limpopo Province there was a serious shortage of staff editors in the examination unit. The staff in the unit were concerned that no efforts were being made to improve the staff situation.

In Mpumalanga, the organogram indicated a staff component of 62. A Chief Education Specialist was holding the post of Director. Key posts were vacant such as language editors and data capturers. The total staff complement at provincial level was 20 with 42 vacancies. Staff in these provinces were working under tremendous pressure. There was a critical staff shortage in the entire examination directorate.

In Gauteng the staff establishment made provision for 191 staff members. At the time of the visit the staff complement of the directorate was being restructured.

In the Western Cape the total staff complement was 107. The directorate is centralised and does not have regional/district/circuit offices.

### 2.3 Registration/enrolment

The schooling system has been experiencing a decline in the number of learners entering for the Grade 12 examinations over the past few years. Table 2.1 and Figure 2.1 show a comparison of the number of candidates for 2001 and 2002.

**Table 2.1: Enrolment for 2001 and 2002 both part-time and full-time candidates:**

Province	2001		2002	
	No. of enrolments		No. of Enrolments	
	Full-Time	Part-Time	Full-time	Part-time
Eastern Cape	69 034	15 085	69 946	15 591
Free State	27 945	27 626	26 116	23 827
Gauteng	68 242	47 023	69 637	49 696
KwaZulu-Natal	99 479	30 632	103 450	32 228
Limpompo	85 233	24 764	74 214	17 998
Mpumalanga	41 432	15 252	42 507	14 756
North West	37 972	21 806	37 884	24 478
Northern Cape	6 898	2 253	6 137	2 409
Western Cape	41 720	13 342	42 471	13 698
<b>TOTAL</b>	<b>477 955</b>	<b>197 783</b>	<b>472 362</b>	<b>194 681</b>

Overall there is a decline in enrolment for both part-time and full-time candidates. Whereas there were 477 955 full-time candidates in 2001, there were 472 783 in 2002. The situation is similar for part-time candidates. Out of 197 783 candidates in 2001, 194 681 candidates are registered 2002. In this case the difference is 3102.

## **2.5 Question Papers, examination centers and personnel**

A total of 1 513 examiners and 513 moderators were appointed countrywide. A total of 477 955 question papers were set for full-time candidates and 197 783 for part-time candidates for the 2002 examination.

Most of the question papers were printed, packed and stored under security at the provincial offices for distribution to the regional and/or district offices shortly before the commencement of the examinations.

A total of 5 814 examination centres were registered with the provincial departments of education. Arrangements regarding invigilation were finalised to the satisfaction of the provincial departments of education and in accordance with the *National Policy on the Conduct of the Senior Certificate Examinations*. The National Monitoring Team in collaboration with SAFCERT and the Provincial Monitoring Teams monitored the writing of the examination.

A total of 28 046 markers were appointed in terms of the Education Labour Relations Act countrywide and a total of 65 marking centres were established countrywide. The National Monitoring Team, in collaboration with SAFCERT and the Provincial Monitoring Teams, also monitored the marking and capturing processes.

## **2.4 Distribution and storage of question papers**

The Eastern Cape contracted a security company to undertake the delivery of the question papers to regional offices and the collection of scripts from the marking centres. Security in the building in which the examination section is housed was a major problem.



In Gauteng the question papers were delivered to district offices on Sundays by 15 trucks from the South African Police Services. The papers were guarded 24 hours a day by a private armed response security company. The provincial department assured the Monitoring Team of very tight security.

Security companies were employed in KwaZulu-Natal to deliver question papers to the regional offices. From the regional offices they were then taken to the nodal collection points.

In Mpumalanga a good storage system was in place with security guards (24 hours) at head office. Storage at district level was addressed by imposing tight security measures. Security companies, contracted by the department, were to be present during the distribution of all scripts to the districts.

In the Limpopo Province the question papers were to be distributed to the 7 regional offices by a private security company. Armed security personnel accompanied officials who were responsible for the distribution of question papers. Security around the building in the examination section at head office had been put into place.

In the Western Cape, as a normal practice, question papers were distributed to the examination centres 10 days in advance. They were sent daily from the provincial office to the examination centre. A courier service was used to deliver the question papers.

The ABET centres in the Western Cape did not have proper security measures and therefore their question papers were stored at the provincial office and they were collected on a daily basis.

## **2.5 The administration of the examinations**

Subsequent to the monitoring of the state of readiness of provincial department of educations to administer the 2002 senior certificate examinations, the national Department of Education's Monitoring Team visited the provincial departments of education again to monitor the actual conducting of the examinations. Provincial

Education Departments were also requested to submit regular reports of progress they were making with regard to conducting the examinations. The examination schedule is shown in Table 2.2

**Table 2 2: Commencement and termination of examinations in each province**

<b>PROVINCE</b>	<b>COMMENCEMENT DATE</b>	<b>TERMINATION DATE</b>
<i>Western Cape</i>	14 October	22 November
<i>Northern Cape</i>	14 October	22 November
<i>Free State</i>	14 October	28 November
<i>Eastern Cape</i>	14 October	22 November
<i>KwaZulu-Natal</i>	14 October	29 November
<i>Mpumalanga</i>	14 October	22 November
<i>Limpopo</i>	14 October	22 November
<i>Gauteng</i>	14 October	29 November
<i>North West</i>	14 October	22 November

It was necessary and important for provincial departments to adhere to the schedule in Table 2.2 as all candidates registered for Grade 12 wrote national examinations.

## **2.6 Marking Process**

In the Eastern Cape the selection of markers took place in accordance with regulations. Tenders had been invited for the establishment of marking centres. In Gauteng, the markers' appointment system was working well. There was one marking centre for Computer Studies Practical and only seven different marking centres for other subjects. In KwaZulu-Natal 16 marking centres were established. In Mpumalanga seven marking venues had been identified. In Limpopo 13 marking centres had been identified. In the Western Cape marking was centralised.

## **2.7 Capture, processing and release of results**

Permission to outsource the capture/verification of the marks in all provinces was granted. It is expected that the results will be released on 27 December 2002 in accordance with the decision of the Council of Education Ministers.

## **2.8 Progress in nodal areas**

Provinces reported that the situation in schools that are situated in nodal areas was not different from that of other schools. Examinations were reported to have been smooth. The Gauteng Department of Education reported a marked difference that occurred in the administration of the Senior Certificate Examination 2002 in all 5 Alexandra Schools where such examinations were conducted.

A definite and increasingly positive attitude was adopted by schools in respect of the monitoring of the examinations is undertaken by departmental officials. All Chief Invigilators were conscientious and cooperated fully with District Officials to ensure that the correct sessions for the writing of the examinations are adhered to and ensured that the correct numbers of question boxes are distributed.

The only centre that required the direct intervention of the GDE was the Alexandra Adult Education Centre where an extraordinarily large number of learners were enrolled. Various classes were and continued to be maximally utilized and this resulted in the failure of the centre to prepare adequately to ensure the smooth running of the exam. To this end, 5 District Officials together with the Deputy Director were strategically placed at the centre during “busy” days to ensure the overall success of the examination.

In the nodal area of Ivory Park, a definite enhancement in the awareness of Examination procedures by both District Officials and Chief Invigilators was observed. Both parties continued to administer tight control over all examinations processes that they are responsible for. At Umqhele Secondary, invigilators who were initially unsure and insecure became positive, co-operative and more confident after the intervention and motivation by the Team Leader. This resulted in a marked change in the attitudes of the invigilators.

On a more general note, Ivory Park has experienced an accelerated rate in learner growth and enrolment. Equisweni Secondary School that had 92 Senior Certificate candidates in 2001 suddenly reflected a candidate roll of 206 learners for the 2002 examination. This situation was also repeated at Umqhele Secondary School where

177 enrolments were recorded in 2001, however the 2002 candidate numbers increased to 219 candidates. These net candidate enrolment increases were noted by the GDE and the necessary assistance and support has been rendered to schools in this nodal area to accommodate the increases.

In Katlehong and Thokoza, the Grade 12 Examinations proceeded without any interruptions. The schools were been prompt in the collection of examination papers prior to each session. It was noted that the planning and organisation by schools in anticipation of the Senior Certificate Examinations improved when compared to the 2001. The accuracy of documentation when submitting answer scripts also improved as compared to 2001.

## **2.9 Irregular incidents reported**

The Department received a few reports of irregular incidents which include following:

- Stolen examination papers in the Western Cape.
- Opening of an incorrect question paper in the Western Cape.
- Placing of water jugs and glasses in an examination room in the North West.
- Non-delivery of a question paper in Mpumalanga.
- Writing on behalf an absent candidate in Mpumalanga
- Involvement of a delivery vehicle in an accident in KwaZulu-Natal

### *2.9.1 Stolen examination papers in the Western Cape*

It was reported that the Strand Police received a tip-off that the Mathematics Standard Grade Paper 2 examination question paper had been leaked. The investigation that followed revealed that the Chief Invigilator at Khanyolwethu Secondary School had removed a pack of two Mathematics SG Paper 2, two Biology SG Paper 1 and one Geography SG Paper 1 papers from the school safe. She reportedly offered the Mathematics SG Paper 1 paper to an Adult Basic Education and Training learner and the rest to one learner's mother.

All question papers were recovered and the Western Cape Education Department (WCED) is satisfied that, other than the Mathematics SG Paper 2, the question papers had neither been shared nor distributed. The mother of learner to whom the Chief Invigilator had given the other question papers had not returned from work when the papers were recovered and therefore had not seen them. The Mathematics SG Paper

2 was replaced Khanyolwethu Secondary School and three other examination centres in the area as a precautionary measure. Unexpected results would be monitored for further investigation, if necessary.

The Chief Invigilator was found guilty of theft in the Strand Magistrates Court and was sentenced to twelve months imprisonment and her contract with the WCED was terminated. The WCED will also charge the school principal with misconduct and negligence in accordance with the Employment of Educators Act, 1996.

### *2.9.2 Opening of an incorrect question paper in the Western Cape*

A Business Economics SG question paper was opened and distributed to candidates instead of Economics SG at Nelson Mandela Secondary School. One learner hid the question paper and later photocopied it and it was distributed and shared among other learners. The incident was investigated and all invigilators were immediately replaced. The Business Economics SG question paper was replaced. Investigations are continuing.

### *2.9.3 Placing of water jugs and glasses in an examination room in the North West*

Invigilators at the Kebonang Secondary School, which is a new examination centre, placed water jugs and glasses in an examination venue for consumption by candidates. Upon entering the examination venue the Chief Invigilator, who is also the school principal, took offence to candidates consuming water in the examination venue and removed the five candidates who had admitted to drinking the water.

This resulted in candidates losing approximately 25 minutes of their writing time and no additional time was given to them to complete their Business Economics (SG) question paper. The Irregularities Committee of the North West Education Department (NWED) investigated the matter and a written warning was given to the Chief Invigilator. It was recommended that the principal should not be suspended since he acknowledged his error and since this was the first year that the Senior Certificate examination was being written at his school. Learners who lost writing time are to be compensated. The NWED will determine how this is to be done.

### *2.9.4 Non-delivery of a question paper in Mpumalanga*

On 16 October 2002, 385 candidates sat to write the Typing (SG) question paper, which comprises a speed test and a section on theory. Upon opening the question paper, the invigilators at the different examination venues discovered that the theory section of the question paper was missing. The Mpumalanga Education Department was alerted and immediate measures were taken to ensure that the affected examination centres receive the missing section of the examination paper. The starting time of the examination was delayed to allow for the distribution of the question papers.

#### *2.9.5 Writing on behalf an absent candidate in Mpumalanga*

The Department of Education's monitoring team monitored the afternoon session of the Senior Certificate Examination in the Eastvaal Region. The team visited Phakama Adult Education Centre, where Afrikaans Second Language HG Paper 3 was to be written by the part-time candidates.

The team discovered that twelve candidates were busy writing instead of thirteen as reflected in the registers. The invigilators revealed one candidate was sent home to fetch an Identity Document after having written section A of the Afrikaans Second Language HG Paper 3. The team noted that the candidate in question was not accompanied. Upon further enquiry, the Chief Invigilator indicated he had no knowledge of the candidate being sent home. The team visited the candidate's home after realising that it was becoming late for her to return. Her sister indicated she had never returned to the house since she left for writing at the centre.

The monitoring team decided to check the number of question papers present in the examination centre as against the question papers delivered. One question paper was missing. This really raised serious suspicion about the alleged missing candidate.

One member of the monitoring team went back to the candidate's house alone and the sister confirmed that she had never come back. By the end of the session, the candidate had not returned to the centre. After the scripts for those who wrote, including this candidate's script, were sealed, the monitoring team decided to search the Chief Invigilator's documents, which were on the table in the control room. To everybody's surprise, a completed script in a different handwriting bearing the same

examination number, as that of the missing candidate was found in the envelope, which the Chief Invigilator accepted as his and had initially refused that it be searched. The Chief Invigilator subsequently confessed that he knew about the script and that he was supposed to include it when packing the rest of the scripts for dispatch. The Chief Invigilator was immediately suspended and the Mpumalanga Education Department will be charging him accordingly.

#### *2.9.6 Involvement of a delivery vehicle in an accident in KZN*

The KwaZulu-Natal Education Department reported that on the evening of 24 November 2002, the delivery vehicle, which was delivering scripts from Northern KwaZulu-Natal, was involved in an accident. Damage to the truck was severe. However, the integrity and safety of the scripts was intact as officials from the Port Shepstone Region, and the Manager of the security company were on hand to salvage the situation. All scripts and packages were accounted for and were removed to the Port Shepstone Region for safekeeping. Alternate arrangements were made for the delivery of these scripts to the designated marking centre in Newcastle. This was followed by an on-site visit at the marking centre to ensure that all scripts have been accounted for.

### **2.10 Conclusion**

Provinces reported that the writing of the examination went relatively well without major problems. The examination timetable was adhered to and provinces engaged the services of private security companies to safeguard the smooth running of the examinations, especially with the transportation of examination question papers and answer scripts.

The overall impression of the 2002 Senior Certificate Examination is that provinces were better prepared to manage these examinations. The few incidents of irregularities were dealt with accordingly and they did not constitute a threat to the credibility and authenticity of the results.

## SECTION 3: PROCUREMENT AND DELIVERY OF LEARNING SUPPORT MATERIALS IN JANUARY 2003

### 3.1 Introduction

In August 2002, three monitoring teams from the Department of Education visited eight of the nine departments for the purpose of monitoring:

- Expenditure on learning support materials for the financial year 2001/2002;
- Actual budgeted funds for textbooks and stationery in the 2002/2003 financial year;
- Plans for the procurement of learning support material for January 2003; and
- Book retrieval systems.

### 3.2 Budget Allocations reported over the past five financial years

Table 3.1 and Figure 3.1 reflect a comparison of the budget allocations for 2002/2003 with the allocations over the past four financial years.

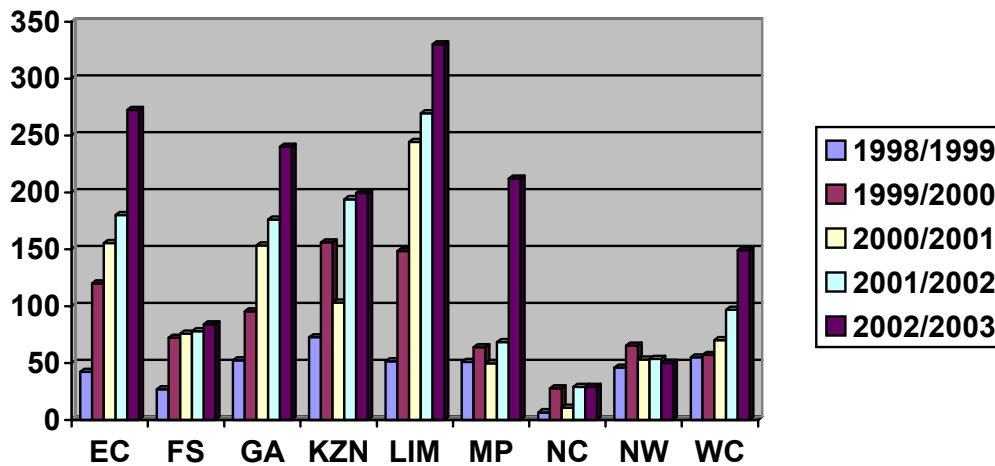
**Table 3.1: LSM budget allocations for the past five financial years.**

Province	Year 1998/999	Year 1999/2000	Year 2000/2001	Year 2001/2002	Year 2002/2003
	R' millions	R' millions	R' millions	R' millions	R' millions
<b>Eastern Cape</b>	42.1	120	155.5	180	272.3
<b>Free State</b>	26.9	72.1	75.7	77.8	84.1
<b>Gauteng</b>	52.3	95.4	153.4	176	240
<b>KwaZulu-Natal</b>	72.6	156	103.3	193.9	199.3
<b>Limpopo</b>	51.5	148.3	244.2	269.4	330
<b>Mpumulanga</b>	51	63.9	49.5	68.5	212
<b>North West</b>	45.9	65.2	53	53.6	50
<b>Northern Cape</b>	6.6	27.6	10.7	28.9	28.9
<b>Western Cape</b>	54.9	57	70	96.8	149
<b>TOTAL</b>	<b>392.6</b>	<b>794.6</b>	<b>920.2</b>	<b>1,162.90</b>	<b>1565.6</b>



**Figure 3.1: LSM budget allocations for the past five financial years.**

It is to be noted that in the Western Cape, an amount of R271 million has been budgeted for allocation to schools according to the Norms and Standards for Funding.



Of this amount, R149 million ( $\pm 55\%$ ) has been earmarked for the procurement of LSM (Stationery and Textbooks).

Figure 4.1 shows that provincial departments of education have consistently increased their budget allocations for LSM over the past five financial years. The allocation for KwaZulu-Natal decreased only for the 2000/2001 financial year.

In procuring LSM Provinces prioritise grades for which the new curriculum is phased in during a particular year and purchase LSM in full for learners. Learners in other grades may not necessarily receive all textbooks due to financial constraints. This implies that even though the budget allocations have increased, it is still not enough to provide for all the needs.

### **3.3 Expenditure on LSM for the financial years 2000/2001 and 2001/2002**

The LSM budget and actual expenditure for the opening of schools in 2000/2001 and 2001/2002 are reflected in Table 3.2.

**Table 3.2: Comparison of LSM budget allocations and corresponding expenditure**

PROVINCE	Financial Year 2000/2001			Financial Year 2001/2002		
	Budget	Expenditure	Difference	Budget	Expenditure	Difference
	R' millions	R' millions	R' millions	millions	R' millions	R' millions
Eastern Cape	155.5	147.9	-7.6	180.0	173.0	-7.0
Free State	75.7	90.0	14.3	77.8	90.2	12.4
Gauteng	153.4	176.0	22.6	181	1711	-10
KwaZulu-Natal	103.3	194.3	91.0	193.9	167.5	-26.4
Limpopo	244.2	131.5	-112.7	269.4	285.1	15.7
Mpumalanga	49.5	48.9	-0.6	68.5	92.1	23.6
North West	53.0	50.0	-3.0	53.6	57.4	3.8
Northern Cape	10.7	10.7	0.0	28.9	31.5	2.6
Western Cape	70.0	70.0	0.0	96.8	106.2	9.4
<b>TOTAL</b>	<b>920.2</b>	<b>927.6</b>	<b>7.4</b>	<b>1,149.9</b>	<b>994.6</b>	<b>24.1</b>

For the 2000/2001 financial year most of the provincial education departments spent more than they had originally budgeted. For the 2001/2002 financial year at least four provinces did not spend all their budgets. KwaZulu-Natal has the highest level of under expenditure amounting to R26.4 million. In the case of Gauteng the amount reflected as under expenditure is committed, but not paid as yet owing to ongoing engagement with suppliers regarding the authenticity of invoices submitted. Eastern Cape also reported that there were problems with the payment of invoices, as the

verification process had not been completed. Overall provinces contributed R24.1 million more than they had originally allocated. This is to be commended.

### 3.4 Projected dates for delivery of LSM: Textbooks

Table 3.3 below indicates the projected dates of delivery of textbooks as well as an indication of the amounts to be delivered.

**Table 3.3: Projected dates of textbook deliveries to schools.**

Province	Projected date of Delivery of textbooks	Comments
Eastern Cape	15 November 2002.	100% for grade 6, and top up for the rest. No percentage given for top-ups.
Free State	30 November 2002 Top-ups: 07 January	100% ordered for grades R, 1 - 3 and 6; and top-ups for grades 11 and 12.
Gauteng	30 October 2002	100% ordered for grade 6 and 10% top-up for the rest of the grades depending on life span of the book.
KwaZulu-Natal	<u>23 September 2002 - 29 November</u>	No indication given of grades and levels procured for.
Mpumalanga	30 September 2002	100% orders for grade 6 and top-ups for grades 1 - 4, 7 - 8 and 10 -12. No % given.
Northern Cape	31 October 2002	100% for grade 6 and top-ups for the rest. No % given.
Limpopo	01 November 2002	100% for grade 6 and top-ups for the rest. No % given. Orders to be made after tender approval.
North West	10 October 2002	100% orders for grade 6. Top-ups will be focused on grade 12 depending on discount received from publishers.
Western Cape	Not later than 06 December 2002	Schools make own requisitions for textbooks and data is captured on School Budget Management

The table reflects that the projected date of delivery of textbooks varies from province to province. KwaZulu-Natal reported to have started delivery of textbooks in September 2002. Most of the other provinces reported dates between October and November for delivery. All provinces, except Free State, expect that the delivery of Grade 6 textbooks will be completed before the schools close on 06 December 2002. It is, however, not clear from the reports what percentage of top-up textbooks will be delivered by the time schools open in January 2003.

Two of the provinces, Limpopo and the Free State projected that their delivery of textbooks will be completed by January 2003; the Free State before the schools open and Limpopo province by the end of January 2003. All the provinces that plan to deliver during school holidays have plans in place so that the distributors will be able to find someone at the schools to receive and sign off for the deliveries.

The Provincial Education Departments have plans in place to ensure that delivery of LSM is completed according to the projected times. Most of the provinces plan to hold monthly meetings with suppliers and delivery contractors to iron out any problems that may hamper delivery, hold emergency meetings with publishers to ensure that all the required titles are printed and delivered, and review reports submitted by the suppliers monthly.

### 3.5. Projected dates of delivery of LSM: Stationery

Table 3.4 below indicates the projected dates of delivery of stationery as well as an indication of the amounts to be delivered.

**Table 3.4: Projected dates of textbook deliveries to schools.**

Province	Projected date of Delivery of stationery	Comments
Eastern Cape	15 November 2002.	Stationery has been ordered all grades except for grades

		- 12. Dept. is reviewing its policy in order to provide for grades 10 - 12 falling under quintile 1-3.
Free State	15 November 2002	100% orders will be placed for all grades when cabinet additional funding.
Gauteng	30 October 2002	100% stationery will be ordered for all grades.
KwaZulu-Natal	13 - 20 January 2003.	Stationery is planned to be ordered for all grades.
Mpumalanga	30 September 2002	Provision for all grades. No % given.
Northern Cape	30 August 2002	Provision for all grades.
Limpopo	15 November 2002	100% orders will be made for all grades after tender approval.
North West	01 November 2002	Top-ups will be made for all grades. No % given.
Western Cape	Not later than 06 December 2002	Requisitions expected by 08/08/02. Schools allowed to retain funds intended for stationery for use until 31/12/03. Stationery ordered by schools throughout school year.

The delivery of stationery and textbooks was scheduled to take place concurrently in most of the provinces. The Northern Cape should be expected to have completed delivery of stationery by the end of August 2002. Gauteng, Mpumalanga, North West and Eastern Cape planned to complete the delivery of stationery by the end of November 2002. The Free State planned to complete delivery before schools close on 06 December while Limpopo expected to complete theirs before schools reopen on 06 January 2002.

KwaZulu-Natal indicated that stationery would be ordered during November due to delays in securing tender approval. It was not possible to verify whether the tender had been approved at the time of compiling the report.

### **3.6. Book Retrieval Systems**

Most of the Provinces do not have good book retrieval systems. As a result, the data on textbook retrieval is incomplete. The process has been left in the hands of the districts and schools. The provincial departments' responses to questionnaires and interviews indicated that a book retrieval questionnaire is sent to schools and calculations are taken from districts/schools that return the questionnaire. The Eastern Cape did not provide data on book retrieval. In the GDE, retrieval stands at 92% across districts; but data is limited since some schools do not complete surveys and questionnaires. In the Limpopo province, the rate of retrieval of textbooks in primary schools is indicated as approximately 90% and in secondary schools as approximately 40% - 55% due to dropouts. Learners tend to keep textbooks in case they need to do supplementary examinations. If this is not applicable, the books are not returned. In the Free State, some schools reported 80 to 100 % retrieval. In the Northern Cape, based on an audit by the national auditor general's office in Pretoria, an average of 79% of LSM was reported as retrieved by schools that were audited.

### **3.7 Conclusion**

All provinces have again increased their budget allocations for the procurement of learning support materials for the opening of schools in January 2003. From the information supplied it is also evident that provincial departments tend to reprioritise and supplement the budget. This is a sign of commitment to governments' call to ensure that learners receive learning support materials within the first week of the opening of schools each year.

Management plans in all provinces indicated that they are ready to meet the challenges of distribution. This aspect in the procurement and distribution chain requires more attention from provincial departments of education particularly as it has embedded in it the development of SMMEs.

In general there has been an improvement in the financial resources made available. All that remains is the improvement of the distribution and book retrieval systems.

## **SECTION 4: FILLING OF POSTS AT REGIONAL/DISTRICT AND SCHOOL LEVEL**

### **4.1. Introduction**

This section of the report focuses on the filling of posts in provincial departments of education. Provincial departments of education were requested to give information regarding the status of the filling of management posts at Regional/District and school level and to indicate their general progress in all schools as well as their progress in Nodal areas

### **4.2 Filling of posts at Regional/District Offices and School level**

The information received from provincial education departments regarding the filling of management posts at regional/district and school level of each provincial department of education is summarized in Table 4.1. The information supplied by some of the provincial departments did not indicate the staff establishment for their respective district offices. It is thus not possible to determine from the information available what percentage of the established posts has been filled.

#### *4.2.1 Regional/District Offices*

Most provincial departments restructured their regional/district offices during the 2000/01 financial year. For example, Eastern Cape had 41 districts prior to the 2000/01 financial year. In keeping with the recommendations from a study of the district structure in the province and provincial development plans, the provincial department of education restructured and reduced the district offices to 24. This accounts for the entry “Not stated” in Table 4.1 regarding district staff. This applies also to Gauteng, Mpumalanga and Western Cape.

**Table 4.1: Filling of management posts at Regional/District and school level at Provincial Departments of Education**

Province	Level	2000/2001	2001/2002	2002/2003	Comments
Eastern Cape	District	Not Stated	22 District Managers (SMS Grade 13) appointed	2 District Managers (SMS Grade 13) appointed	28 posts of Chief Education Specialist (CES) advertised to be filled by 31 January 2003. Vacancies regarding other levels of middle management to be filled by 31 January 2003 through restructuring according to Resolution 07/2002.
	School	307 Principal posts filled	450 Principal posts filled	150 Principal posts filled	Vacancies not stated.
Free State	Regional/District and School	998 posts filled	485 posts filled	859 posts filled	The progress of filling management posts improved from 91% in 2000/2001 to 94% in 2001/2002 and currently stands at 95%
Gauteng	Provincial & District	Not Stated	3 posts (SMS Grade 14 & 15) were filled during 2002		4 posts (SMS Grade 13) are currently vacant
	School	Not Stated	132 Principal posts and 692 Deputy Principal and School-based Heads of Department were filled during 2002.		The GDE filled all the funded vacant promotion posts early in the 2002 academic year. All school-based managers occupied their posts from the second term 2002.
KwaZulu-Natal	Regional/District and School	Not Reported	Not Reported	Not Reported	
Mpumalanga	Provincial, Regional & District	Not Stated	175 of 280 vacancies filled.	182 of 285 vacancies filled.	The MDE adopted a new organisational structure with effect from 1 April 2001. There are currently 103 vacancies of which all SMS posts as well as 90% of the remaining posts have been advertised to be filled.
	School	Not Stated	1,797 of 1,873 Principal posts, 2,240 of 3,057 Deputy Principal posts and 2,240 of 5,716 School-based Heads of Department posts filled.	1,696 of 1,866 Principal posts, 811 of 782 (29 additional) Deputy Principal posts and 2,943 of 3,080 School-based Heads of Department posts filled.	The vacant 170 Principal posts were advertised in the October 2002 Vacancy List. The other additional posts will however only be advertised after excesses in these ranks have been identified.
Northern Cape	District	4 PL5 posts filled. No vacancies	No vacancies	4 Director (SMS Grade 13) posts filled. 4 PL5 posts vacant and advertised in August 2002.	The 4 posts vacant are currently filled with staff acting in those posts. It is planned to fill the posts with permanent appointments at the beginning of 2003.
	School	18 Principal (3.6%) & 25 Deputy Principal (11.4%) posts vacant.	36 Principal (7.3%) & 18 Deputy Principal (8.5%) posts vacant.	30 Principal (6.5%) & 12 Deputy Principal (5.6%) posts vacant.	Vacancies identified for 2000/2001 advertised and filled on 1 July 2000. Vacancies identified for 2001/2002 advertised and filled on 1 July 2001. Vacancies identified for 2002/2003 advertised and to be filled on 1 January 2003.
Limpopo	Regional and District	Not Stated	Not Stated	Not Stated	
	School	316 Principal posts filled	194 Principal and 800 Deputy Principal posts filled	603 Principal and 800 Deputy Principal posts filled	3,832 vacant School-based Head of Department posts have been identified to be advertised as soon as the absorption of excess educators has been completed.
North West	Regional and District	65 of 88 posts filled (74%)	65 of 98 posts filled (66%)	89 of 98 posts filled (91%)	The Professional Support Managers vacancies has been advertised. A moratorium is currently placed on the filling of District Manager posts.
	School	6, 414 of 7,221 posts filled (89%)	6, 636 of 7,050 posts filled (94%)	6,749 of 6,983 posts filled (97%)	The overall vacancy rate has dropped from 46% to 2%. The existing 134 vacant posts have been advertised and NWDE is currently processing the filling thereof.
Western Cape	District	Not Stated	7 SMS Grade 13, 21 PL5 educator posts and 7 Deputy Director posts were filled.		All the management posts were appropriately filled with permanent appointments.
	School	Of 1,542 public ordinary schools 98.7% principals held permanent positions.	Of 1,566 public ordinary schools, 93.8% were managed by permanently appointed principals.	All the remaining 111 vacant posts for principals have been advertised, except for one that fell vacant owing to a dismiaasal in August 2002.	The WCDE intended to advertise posts for principals on a quarterly basis in 2002. However, this could not be realised because of Resolution 7 and 8 of 2002. Nevertheless, the WCDE succeeded in advertising posts for principal during most of 2002.



Progress has been made with the filling of management posts during the 2001/02 and 2002/03 financial years at district level. The information is also summarized in Table 4.1.

#### *4.2.2 School level*

The information received from provincial education departments regarding the filling of management posts at school level at each provincial department of education is also summarized in Table 4.1 and in Table 4.2.

Most provinces however did not separate the posts according to principal, deputy principal or head of department posts. Eastern Cape reported only on the principals' posts; Free State did not delineate the posts. Gauteng reported that all school-based managers occupied their post by the second term in 2002. The percentage of principals reported to be in their posts in Mpumalanga is approximately 91% with 170 vacant principals' posts. Northern Cape reported that it has currently 6.5% vacant principals posts and 5.6% vacant deputy principals posts. North West reported that it has 97% of the principals in their posts. Western Cape has 93% of the principals in their posts.

From the information available more than 98% of the schools in Gauteng, Northern Cape, North West and Western Cape have principals in their posts. Mpumalanga has approximately 91%. It has not been possible to determine the occupancy rate in the remaining provinces.

### **4.3 Filling of management posts at Regional/District and school level in Nodal Areas at the Provincial Departments of Education**

The information received from provincial education departments regarding the filling of management posts at regional/district and school level of the Nodal areas at each provincial department of education is summarized in Table 4.3

**Table 4.3: Filling of management posts at Regional/District and school level in Nodal Areas at the Provincial Departments of Education**

Province	Level	2000/2001	2001/2002	2002/2003	Comments
<b>Eastern Cape</b>	District & School	Not separately reported. The information is included in Table 4.2.1			
<b>Free State</b>	School	192 schools advertised posts. 156 posts filled (81%).	78 schools advertised posts. 76 posts filled (97%).	47 schools advertised posts. 45 posts filled (96%).	The filling of promotional posts at Nodal Areas has improved significantly since 2000/2001
<b>Gauteng</b>	District & School	Not separately reported. The information is included in Table 4.2.1. GDE has ensured school functionality and stability through the filling of all vacant and funded management posts at school level.			
<b>KwaZulu-Natal</b>	Regional/District & School	Not reported.			
<b>Mpumulanga</b>	Regional/District & School	Not separately reported. The information is included in Table 4.2.1. MDE are in the process to fill all management posts. 170 principal posts currently vacant have been advertised.			
<b>Northern Cape</b>	School	2 Principal & 2 Deputy Principal posts vacant, advertised in March 2000 and filled on 1 July 2000.	5 Principal & 7 Deputy Principal posts vacant, advertised in April 2001 and filled on 1 July 2001.	3 Principal & 4 Deputy Principal posts vacant, advertised in October 2002 and to be filled on 1 January 2003.	Over the past three years the NCED ensured that vacancies in Nodal schools were filled as soon as possible.
<b>Limpopo</b>	Regional/District & School	Not separately reported. The Nodal Areas are showing good signs of improvement. The information is included in Table 4.2.1.			
<b>North West</b>	Regional/District & School	Not separately reported. The information is included in Table 4.2.1. NWDE are in the process to finalize the filling of all vacancies in the first three months of 2003.			
<b>Western Cape</b>	District	Not separately reported. The information is included in Table 4.2.1.			
	School	Not stated	Out of 145 schools in Nodal areas there are 130 schools with permanent principals and 15 schools with acting principals.		Of the 15 vacancies, 14 were advertised to be filled in the current financial year. One post fell vacant during August 2002 as the result of the dismissal of the principal.

Only three provinces Free State, Northern Cape and Western Cape reported significantly on nodal areas. The information supplied by the remaining six provincial departments of education did not report separately on nodal area.

The Department of Education has however been monitoring nodal areas under the School Effectiveness Programme describe in the Tirisano Implementation Plan. Information that is currently available regarding the principals' posts is listed in Table 4.4.

**Table 4.4: Synoptic data on school effectiveness in Nodal Areas**

Province	Nodal Area	Prim	Jun Sec	Sec	Special	Learners	Educators	Principal Appointment	
								Temp	Perm
Eastern cape	<i>Lusikisiki</i>	47	64	32	-	95772	1897		179
	<i>Mdantsane</i>	82	-	32	-	49822	1646		50
	<i>Port Elizabethl</i>	-	-	-	-	109709	4667-	-	238
Free state	<i>Thabo Mofutsanyana</i>	96	49	-	1	97651	3157	4	142
Gauteng	<i>Alexandra</i>	13	-	3	1	23761	608	1	16
	<i>Katlehong</i>	38	-	14	3	72716	1887	9	46
KwaZulu-Natal	<i>Nongoma</i>	41	5-	10	-	21070	549		56
	<i>KwaMashu</i>	63	-	21	-	56426	1665		-
	<i>Inanda</i>	59	-	17	-	49728	1202		-
Limpopo	<i>Bushbuckridge</i>	69	-	39	-	58460	4544	18	90
	<i>Sekhukhune</i>	0	-	13	-	6773	246	-	13
Mpumalanga	<i>Groblersdal</i>	134	-	47	-	90112	2510	3	178
N west	<i>Mothibistad</i>	133	-	52	1	48450	1376	7	179
Northern cape	<i>Francis Baard</i>	23	-	12	-	33191	1148	2	33
Western cape	<i>Khayelitsha</i>	38	-	12	-	61076	1681	3	47
	<i>Mitchel's Plain</i>	0	-	-	-	-	-	-	-
<b>Total</b>	<b>16</b>	<b>836</b>	<b>118</b>	<b>287</b>	<b>6</b>	<b>874717</b>	<b>24116</b>	<b>47</b>	<b>1267</b>

The information supplied in Table 4.4 has to be read taking note that the names used for the nodal areas may sometimes be the same names used for education districts. A distinction has therefore to be made between a Nodal area and an education district. The information is included to give a global view of the schools, learners and educators. The information will be refined in the next report to where progress in the nodal areas will be dealt with comprehensively. From information available most of the schools in the nodal areas have school principals in place. Mpumalanga – Groblersdal had 15 schools that were closed due to shortage of learners. The possible causes of the shortage of learners in some schools has been referred in Section 1 of this report as arising out of migration and to other areas.

#### **4.4 Conclusion**

In the North West, significant progress has been made as the number of vacant management posts at schools has been decreased from 3430 to 134. The overall vacancy rate has dropped from 46% to less than 2%. The progress of filling management posts in the Free State has improved from 91% in 2000/2001 to 94% in 2001/2002 and currently stands at 95%.

In Limpopo the filling of principals' posts in schools is picking up but budgetary constraints are a hindrance. Limpopo is currently busy with a process to identify excess educators and will advertise 3,832 vacant School-based Head of Department posts as soon as the latter educators have been absorbed.

In the Free State, the progress of filling promotional posts in general and specifically, at the nodal areas has improved in the past 3 years. Improvement was at 91% in the 2000/01 financial year, 94% for 2001/02 and currently stands at 95%. Decrease in learner numbers resulted in schools no longer qualifying for the posts. 899 posts advertised in the financial years 2000/01 and 2001/02 were newly created.

The most important management appointment was that of Mr. RB Swartz who took up his position as Superintendent-General and Head of Education in the Western Cape. The Western Cape also succeeded in appointing permanent staff to all management posts in the Education Management and Development Centres during the course of 2001 and 2002. Considerable progress has been made in appointing principals to permanent positions during the course of 2002.

Most of the schools in nodal areas have principals in place. This is important considering the number of learners and educators in these deprived areas.

## **SECTION 5: CONCLUSIONS**

The education system inherited school infrastructure that was not a priority before 1994 particularly in rural communities. It is for this reason that it will take a few more years to eliminate all school infrastructure backlogs. Despite this, much work has already been achieved through the commitment by government to alleviate deprivation by increasing financial resources. The challenges ahead are enormous but not insurmountable. To succeed government departments at both national and provincial level have to improve planning and managing systems of procurement.

The participation of the international community in assisting government with school infrastructure development is commendable. Many lessons have been learnt and much experience has been gained in developing mechanisms for managing donor assistance. This should improve the utilization of donor funds and increase the rate of service delivery in the coming years.

The administration of examinations appears to have reached maturity. However with curriculum developments in the education system the system, of conducting examinations is also likely to change over the years. Departments of education will still have to factor these developments into managing the administration of Grade 12 examinations.

The procurement and distribution of learning has improved but there is still room to effect further improvements. The choice of service providers for the distribution of learning support materials has not yet reached maturity. However the situation will improve with time as school governing bodies develop expertise in school governance and are able to take on the functions of purchasing learning support materials and managing resources.

The filling of posts in the education system remains an important issue to monitor on a continuous basis. Although reporting has not been adequate for this report, indications are that most of the provincial departments are doing their best to ensure that the

different levels of the system are adequately staffed within the available resources. A challenge for the provincial departments that are still struggling with the issue should be to seek strategies and systems for ensuring that posts do not remain vacant for unnecessarily long periods.