

# Vote 14

## Basic Education

### Budget summary

R million	2010/11				2011/12	2012/13
	Total to be appropriated	Current payments	Transfers and subsidies	Payments for capital assets	Total	Total
<b>MTEF allocation</b>						
Administration	252.8	239.9	12.2	0.7	262.0	275.0
Curriculum Policy, Support and Monitoring	1 354.3	1 273.7	80.1	0.5	1 757.8	1 895.6
Teachers and Education Human Resources Development and Management	513.7	88.5	424.0	1.2	546.0	573.5
Planning, Quality Assessment and Monitoring and Evaluation	148.7	130.4	17.4	0.9	156.7	166.1
Social Responsibility	3 896.7	44.5	3 851.4	0.8	4 827.3	5 189.1
<b>Total expenditure estimates</b>	<b>6 166.2</b>	<b>1 777.1</b>	<b>4 385.1</b>	<b>4.1</b>	<b>7 549.8</b>	<b>8 099.3</b>
Executive authority	Minister of Basic Education					
Accounting officer	Director-General of Basic Education					
Website address	www.education.gov.za					

*The Estimates of National Expenditure booklets for individual votes are available on [www.treasury.gov.za](http://www.treasury.gov.za). They provide more comprehensive coverage of vote specific information, particularly about goods and services, transfers, public entities and lower level institutional information.*

### Aim

*The aim of the Department of Basic Education is to develop, maintain and support a South African school education system for the 21<sup>st</sup> century.*

### Programme purposes

#### Programme 1: Administration

**Purpose:** Manage the department and provide strategic and administrative support services.

#### Programme 2: Curriculum Policy, Support and Monitoring

**Purpose:** Develop curriculum and assessment policies for basic education and monitor their implementation.

#### Programme 3: Teachers and Education Human Resources Development and Management

**Purpose:** Promote quality teaching and institutional performance through effective supply, development and utilisation of human resources.

#### Programme 4: Planning, Quality Assessment and Monitoring and Evaluation

**Purpose:** Promote quality and effective service delivery in the basic education system through research, monitoring and evaluation, planning and assessment.

## **Programme 5: Social Responsibility**

**Purpose:** Develop policies and programmes to increase the participation of learners in schools and improve the quality of learning in schools.

### **Strategic overview: 2006/07 – 2012/13**

As part of the process of reorganising government departments when the new administration took over in May 2009, the Department of Education was split into two departments: the Department of Basic Education and the Department of Higher Education and Training. In light of the importance of education to the overall development of South Africa, it was believed that there needed to be a specific focus on improving education in schools, and that what was needed to do this was significantly different from the principles applied at the higher education level. The key strategic objective of the Department of Basic Education is to ensure that quality education is provided to all learners in the South African schooling system. This is achieved by ensuring that the department's policies and the approved curriculum are effectively implemented and reviewing and refining those areas that do not contribute to quality education.

#### **Implementing appropriate frameworks and monitoring tools**

Appropriate funding frameworks and monitoring tools to ensure adequate, effective and equitable funding in the education sector are critical to support the successful implementation of education policies. In light of this, the national norms and standards for school funding were reviewed in 2007 and the national norms and standards for funding adult learning centres were published in December 2007, followed by the Grade R funding norms in January 2008.

#### *The integrated quality management system*

The integrated quality management system was implemented in 2008/09 with a view to assessing school based educators to identify areas in need of development. External moderators were appointed to visit schools to monitor the implementation of the system. A ministerial committee was established to review the governance, scope, functions and expertise required for an effective national education evaluation and development unit. The unit will be set up over the medium term to provide oversight of the measurement and improvement of teacher performance.

Over the medium term, there will be a policy shift in the assessment of principals and their deputies. They will no longer be evaluated in terms of the integrated quality management system, but in terms of a separate performance management and development system. This system will give principals more responsibility for managing their schools, but will hold them accountable for the performance of their schools and teachers. Provinces, as employers, will be responsible for overseeing the signing of their performance contracts and the subsequent implementation of the policy. The national department will be responsible for monitoring the implementation through visits by external moderators and evaluating the reports on their performance from provinces.

#### *Appropriate allocation of educator posts to schools*

The educator post provisioning model has been revised and is currently being tested to assess its impact on the quality of teaching and learning in schools. The redress component of this model will address the needs of poorer schools by allocating them more posts. The revised model compensates for the different needs of small and multi-grade teaching schools and will attempt to manage the staffing uncertainty created by annual learner number fluctuations. The number of posts allocated to schools will also be directly linked to the curriculum offered by schools. An education human resource management system that will enhance the administration of conditions of service of educators by improving the management of information on salaries, allowances, housing, leave and pension in human resource systems is being developed and will be implemented by provinces in 2010.

*System for tracking patterns of learner enrolment, completion and dropping out*

Tracking changes in the patterns of enrolment, completion, retention and dropouts among learners will be made possible through the learner unit record information and tracking system. This system will also provide accurate enrolment numbers and will be able to track individual learner movement horizontally within the system from school to school and province to province, as well as vertically from grade to grade across schools and provinces. The system will be the primary tool for reporting on individual learners that do not complete or reach secondary school level. Accurate biographical, migration and performance profiles of each learner will be available, which will assist with the development of appropriate support interventions. The system will be the main monitoring tool to establish whether the required increase in secondary school enrolment by 2014 has been reached and to monitor the enrolment goals for Grade R.

*Management system for education infrastructure*

The lack of credible information on existing education facilities and infrastructure requirements has been a major constraint in the provision of school infrastructure and made it difficult to monitor progress and plan. An attempt was made to establish a schools register of needs based on studies undertaken in 1996 and 2000. In order to update these databases and to address problems in these early studies, an update and expansion of these audits has been undertaken and is being referred to as the national education infrastructure management system. The first phase of the system has now been completed and the continued use of the application has highlighted various requirements for improvements, which will be addressed via planned enhancements to the database. Infrastructure provision has also previously taken place without specific national or provincial policies, norms or strategies to guide and support its development. In response, the proposed policy on an equitable provision of an enabling physical environment for teaching and learning and the national norms and standards for school infrastructure have been developed. They will be used to standardise the design and construction of schools and will lead to gains in cost, through economies of scale and efficiency, and quicker turnaround times for construction.

*The national curriculum statement*

The national curriculum statement for grades R to 12 has been successfully implemented in all grades in the schooling system. The 2008 Grade 12 cohort was the first to write the national senior certificate examinations after the development and implementation of modern, relevant and high level curricula and assessment in 29 subjects in grades 10, 11 and 12. To aid the expansion of mathematics, science and technology in grades 10, 11 and 12, a mathematics, science and technology education strategy was developed. The strategy includes special mathematics and science support to the 500 Dinaledi schools, with the aim of increasing the number of learners passing mathematics and science. The maths, science and technology education strategy will be evaluated in 2010 to guide the development of support in these subjects. The plan for the use of ICT in teaching and learning was outlined in the 2003 White Paper on e-Education. This was followed by a number of guidelines and policy documents on the specific application of ICT in education and will be rolled out further over the medium term.

*Foundations for Learning campaign*

The Foundations for Learning campaign was launched in 2008 to provide support for the development of foundation literacy and numeracy skills in the early grades. Workbooks, supported by teacher lesson plans and guidelines, will be distributed to all learners from grades R to 6 in the 2010 academic year. Based on the lessons learnt from the 2008 and 2009 annual national assessments, the department will appoint experts to participate in the development of tests, improve quality assurance by moderating scripts from a sample of schools, analyse data from a sample of schools and prepare a national report, and print the assessments for all learners in grades 3, 6 and 9.

*Focus over the medium term*

In striving towards quality teaching and learning, the department will ensure that it provides strategic leadership and direction. It will also promote social transformation, justice and cohesion, and the development of a South African identity in the education system. A number of guidelines and programmes are in place to assist schools in addressing discrimination and promoting social cohesion, such as the integration and anti-discrimination strategy and the Bill of Responsibilities, which, though not a legal document, is taught to children as part of the life skills curriculum. A focus over the medium term will be on developing, monitoring and evaluating policies and programmes for the overall health of learners and educators in the education system as well as providing access to and participation in school enrichment and adult literacy programmes.

**Savings and cost effective service delivery**

Efficiency savings of R13.8 million in 2010/11, R16.8 million in 2011/12 and R18.3 million in 2012/13 have been identified in all programmes under goods and services, mainly in travel and subsistence, printing and publications, and consultancy fees. A reprioritisation of activities was undertaken to create efficiency savings over the medium term and address the projected shortfalls on the budget for compensation of employees.

**Selected performance indicators****Table 14.1 Basic Education**

Indicator	Programme	Past			Current	Projections		
		2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
Number of new learners enrolled in the Kha Ri Gude mass literacy campaign per year	Social Responsibility	–	–	360 000	352 000	600 000	600 000	600 000
Number of learners who complete the Kha Ri Gude course per year	Social Responsibility	–	–	342 000	334 400	480 000	480 000	480 000
Number of learners fed a meal each school day per year	Social Responsibility	6 million	6 million	6.1 million	7.4 million	9.5 million	10.5 million	10.8 million
Percentage of matric mathematics higher grade (or equivalent) passes at the Dinaledi schools per year	Curriculum Policy, Support and Monitoring	57.3% (6 124)	52.3% (6 105)	50.1% (15 184)	57% (11 462)	60% (15 000)	65% (17 000)	70% (25 000)
Percentage of matric science higher grade (or equivalent) passes at the Dinaledi schools per year	Curriculum Policy, Support and Monitoring	50.8% (6 936)	43.8% (6 397)	30% (8 289)	47% (4 920)	50% (6 000)	53% (8 000)	60% (11 000)
Total number of learners captured by the learner unit record information tracking system	Planning, Quality Assessment and Monitoring and Evaluation	–	–	4.2 million	7.2 million	10 million	10.5 million	10.8 million
Total number of public ordinary schools interacting with learner unit record information tracking system regularly to update learner data	Planning, Quality Assessment and Monitoring and Evaluation	–	–	7 400	17 000	24 000	25 000	25 600
Number of public ordinary schools moderated through school based integrated quality management system evaluations per year	Teachers and Education Human Resources Development and Management	–	–	4 021	7 500	8 500	9 000	9 500

## Expenditure estimates

**Table 14.2 Basic Education**

Programme	Audited outcome			Adjusted appropriation	Revised estimate	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10		2010/11	2011/12	2012/13
R million								
1. Administration	100.7	114.7	131.5	159.3	155.1	252.8	262.0	275.0
2. Curriculum Policy, Support and Monitoring	73.7	293.9	539.5	1 070.4	787.6	1 354.3	1 757.8	1 895.6
3. Teachers and Education Human Resources Development and Management	38.5	173.4	280.4	498.6	495.8	513.7	546.0	573.5
4. Planning, Quality Assessment and Monitoring and Evaluation	79.7	170.3	215.5	133.6	152.8	148.7	156.7	166.1
5. Social Responsibility	1 279.1	1 413.0	2 117.5	2 612.4	2 606.6	3 896.7	4 827.3	5 189.1
<b>Total</b>	<b>1 571.6</b>	<b>2 165.3</b>	<b>3 284.4</b>	<b>4 474.4</b>	<b>4 197.9</b>	<b>6 166.2</b>	<b>7 549.8</b>	<b>8 099.3</b>
Change to 2009 Budget estimate				944.6	668.1	786.9	1 035.7	1 259.7

### Economic classification

<b>Current payments</b>	<b>296.1</b>	<b>621.4</b>	<b>949.8</b>	<b>1 456.0</b>	<b>1 179.5</b>	<b>1 777.1</b>	<b>2 018.0</b>	<b>2 144.1</b>
Compensation of employees	117.0	150.4	186.3	229.9	251.4	255.4	273.8	288.1
Goods and services	179.1	471.0	763.6	1 226.1	928.1	1 521.7	1 744.2	1 856.0
<i>of which:</i>								
<i>Inventory: Stationery and printing</i>	8.0	19.0	99.2	48.2	36.0	80.0	99.6	103.8
<i>Property payments</i>	1.0	0.8	10.9	2.3	2.3	127.6	133.4	138.9
<i>Travel and subsistence</i>	41.4	44.1	52.4	47.8	52.8	46.5	48.6	51.3
<i>Operating expenditure</i>	22.3	244.7	356.0	443.6	433.6	1 130.7	1 312.9	1 404.4
<b>Transfers and subsidies</b>	<b>1 262.6</b>	<b>1 523.7</b>	<b>2 321.7</b>	<b>3 009.7</b>	<b>3 009.7</b>	<b>4 385.1</b>	<b>5 529.0</b>	<b>5 952.3</b>
Provinces and municipalities	1 242.6	1 376.9	2 114.1	2 575.4	2 575.4	3 931.4	5 048.1	5 447.4
Departmental agencies and accounts	7.5	134.9	196.2	418.1	418.1	441.5	468.0	491.4
Foreign governments and international organisations	8.7	10.7	10.5	11.5	11.5	12.2	12.9	13.5
Non-profit institutions	–	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Households	3.8	1.2	0.8	4.6	4.6	–	–	–
<b>Payments for capital assets</b>	<b>3.1</b>	<b>5.0</b>	<b>12.8</b>	<b>8.8</b>	<b>8.8</b>	<b>4.1</b>	<b>2.8</b>	<b>2.8</b>
Machinery and equipment	3.0	4.8	11.2	8.5	8.5	4.0	2.8	2.8
Software and other intangible assets	0.0	0.2	1.5	0.3	0.3	0.0	0.1	0.1
<b>Payments for financial assets</b>	<b>9.8</b>	<b>15.1</b>	<b>0.1</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>1 571.6</b>	<b>2 165.3</b>	<b>3 284.4</b>	<b>4 474.4</b>	<b>4 197.9</b>	<b>6 166.2</b>	<b>7 549.8</b>	<b>8 099.3</b>

## Expenditure trends

Expenditure increased from R1.6 billion in 2006/07 to R4.5 billion in 2009/10, at an average annual rate of 41.7 per cent, and is expected to grow at an average annual rate of 21.9 per cent over the medium term. The growth in both periods is mainly due to increases in the national school nutrition programme conditional grant, the mass literacy campaign, and the workbooks project.

The *Social Responsibility* programme makes up an average of 63.7 per cent of total expenditure. Transfers to provincial education departments for the national school nutrition programme are the main component of this programme's spending.

The budget provides additional allocations over the MTEF period of R800.8 million, R1.1 billion and R1.3 billion for the following priority areas:

- the national assessments of grades 3, 6 and 9 (R10 million, R8 million and R10 million)
- the increased unitary fee for the public private partnership for the new building for office accommodation (R30 million, R32 million and R34 million)

- workbooks (R750 million, R930 million and R1 billion)
- the national school nutrition programme conditional grant (R120.4 million in 2012/13)
- Dinaledi schools conditional grant (R70 million in 2011/12 and R100 million in 2012/13)
- compensation of employees inflation adjustment (R10.8 million, R12.5 million and R13.6 million).

## Departmental receipts

Departmental receipts are not significant and arise mainly from fees for technical examinations.

**Table 14.3 Departmental receipts**

R thousand	Audited outcome			Adjusted estimate	Revised estimate	Medium-term receipts estimate		
	2006/07	2007/08	2008/09	2009/10		2010/11	2011/12	2012/13
<b>Departmental receipts</b>	<b>576</b>	<b>1 865</b>	<b>1 452</b>	<b>904</b>	<b>856</b>	<b>1 097</b>	<b>1 217</b>	<b>1 228</b>
Sales of goods and services produced by department	247	401	537	459	580	552	577	583
Sales of scrap, waste, arms and other used current goods	3	–	43	90	30	62	65	65
Interest, dividends and rent on land	3	13	315	30	18	158	172	174
Sales of capital assets	142	20	–	–	5	–	–	–
Transactions in financial assets and liabilities	138	1 238	507	325	208	325	403	406
<b>Total</b>	<b>576</b>	<b>1 865</b>	<b>1 452</b>	<b>904</b>	<b>856</b>	<b>1 097</b>	<b>1 217</b>	<b>1 228</b>

## Programme 1: Administration

### Expenditure estimates

**Table 14.4 Administration**

Subprogramme	Audited outcome			Adjusted appropriation	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
R million							
Minister <sup>1</sup>	0.5	0.6	0.8	1.7	1.8	1.9	2.0
Deputy Minister <sup>1</sup>	0.8	1.0	1.0	1.3	1.5	1.6	1.7
Management	43.2	51.0	50.5	61.3	57.5	58.5	62.3
Corporate Services	38.5	45.4	39.7	44.7	58.2	59.6	62.7
National and Provincial Coordination and Administration	3.7	6.2	7.0	8.3	7.1	7.6	8.0
Office Accommodation	13.9	10.6	32.4	42.0	126.7	132.7	138.3
<b>Total</b>	<b>100.7</b>	<b>114.7</b>	<b>131.5</b>	<b>159.3</b>	<b>252.8</b>	<b>262.0</b>	<b>275.0</b>
Change to 2009 Budget estimate				9.7	75.5	74.5	80.1

<sup>1</sup>. From 2008/09, the current payments relating to the total remuneration package of political office bearers are shown, before this, only salary and car allowance are included. Administrative and other subprogramme expenditure may in addition include payments for capital assets as well as transfers and subsidies.

### Economic classification

	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
<b>Current payments</b>	<b>83.8</b>	<b>92.0</b>	<b>119.1</b>	<b>140.0</b>	<b>239.9</b>	<b>248.4</b>	<b>260.7</b>
Compensation of employees	36.2	44.1	53.4	66.6	70.2	70.8	75.2
Goods and services	47.6	47.9	65.7	73.4	169.7	177.6	185.5
<i>of which:</i>							
Inventory: Stationery and printing	1.8	1.3	1.7	1.8	2.4	2.5	2.6
Property payments	0.9	0.7	10.8	2.2	127.0	132.8	138.3
Travel and subsistence	7.7	11.1	10.7	8.6	8.5	8.8	9.4
Operating expenditure	1.9	1.4	2.2	1.5	1.6	1.8	1.8

Table 14.4 Administration (continued)

Subprogramme	Audited outcome			Adjusted appropriation	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
R million							
<b>Transfers and subsidies</b>	<b>9.5</b>	<b>11.7</b>	<b>11.0</b>	<b>15.1</b>	<b>12.2</b>	<b>13.0</b>	<b>13.6</b>
Departmental agencies and accounts	0.1	0.1	0.1	0.1	0.1	0.2	0.2
Foreign governments and international organisations	8.6	10.4	10.5	11.4	12.1	12.8	13.4
Non-profit institutions	–	0.1	0.1	0.1	0.1	0.1	0.1
Households	0.8	1.2	0.4	3.5	–	–	–
<b>Payments for capital assets</b>	<b>1.8</b>	<b>1.8</b>	<b>1.3</b>	<b>4.2</b>	<b>0.7</b>	<b>0.6</b>	<b>0.6</b>
Machinery and equipment	1.8	1.8	1.3	4.1	0.6	0.6	0.6
<b>Payments for financial assets</b>	<b>5.6</b>	<b>9.1</b>	<b>0.0</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>100.7</b>	<b>114.7</b>	<b>131.5</b>	<b>159.3</b>	<b>252.8</b>	<b>262.0</b>	<b>275.0</b>

## Details of selected transfers and subsidies

Foreign governments and international organisations							
<b>Current</b>	<b>8.6</b>	<b>9.5</b>	<b>10.5</b>	<b>11.4</b>	<b>12.1</b>	<b>12.8</b>	<b>13.4</b>
United Nations Educational, Scientific and Cultural Organisation	6.7	7.7	8.6	9.6	10.1	10.7	11.3
Commonwealth of Learning	1.8	1.8	1.9	1.8	1.9	2.0	2.1

## Expenditure trends

Expenditure increased at an average annual rate of 16.5 per cent, from R100.7 million in 2006/07 to R159.3 million in 2009/10. It is expected to increase further over the medium term, at an average annual rate of 20 per cent to reach R275 million. The increase for both periods is mainly in the *Corporate Services* subprogramme and can largely be attributed to the unitary fee for the public private partnership for a new building for office accommodation for the department. Construction on the new building began in 2007. This also accounts for the high consultancy fees in 2006/07 and the marked increase in property payments over the MTEF period.

## Programme 2: Curriculum Policy, Support and Monitoring

- *Curriculum Implementation and Monitoring* supports and monitors the implementation of the national curriculum policy. Activities in this subprogramme include the curriculum for the schooling system, early childhood development and inclusive education. Funds will mainly be used for transfer payments to provinces for the technical schools recapitalisation conditional grant.
- *National Curriculum Institute* researches and develops policy, programmes and systems within an inclusive education framework for schools, early childhood development and learners with special learning needs. Funds will mainly be used for compensation of employees and other personnel related costs.
- *Curriculum and Quality Enhancement Programmes* supports programmes that enhance curriculum outcomes in the basic education system. Activities include: children and youth literacy; quality improvement and development support; curriculum innovation; foundations for learning; and Dinaledi support. Funds will mainly be used for compensation of employees and goods and services.
- *Kha Ri Gude Literacy Project* expands the provision of basic literacy education for adults. Funding is used for stipends to volunteer educators, learner and teacher support materials, and assessments.

## Objectives and measures

- Reduce the number of illiterate adults in South Africa by 1.5 million by 2011 through the Kha Ri Gude mass literacy campaign.
- Contribute to poverty alleviation by recruiting and training 37 500 volunteer educators and coordinators for the Kha Ri Gude mass literacy campaign in 2010/11.

- Improve the quality of mathematics, science and technology education by providing support to and monitoring the performance and participation of 500 Dinaledi schools in these subjects in 2010/11 to increase the pass rates.
- Improve educational outcomes in the long term by increasing the number of 5-year-old learners enrolled in publicly funded Grade R classes in public primary schools and community based early childhood development sites to 900 000 learners by January 2011.

### Service delivery focus

In 2009, there was a 77 per cent (620 223) national enrolment coverage for Grade R learners at public and independent primary schools, with a further 200 000 learners in classes at community sites. The minimum teacher qualification for Grade R has been set at matric plus 3 years and towards the end of 2009, learner and teacher support material was developed and distributed to all schools at the beginning of 2010.

In 2009, Grade 12 practical assessment tasks were developed for all subjects, including practical components for 2010. Examples of these assessment tasks were uploaded onto the Thutong education portal and CDs were distributed to schools during monitoring visits. Examples of question papers were circulated in the Sunday Times newspaper and at schools during monitoring visits. 760 schools were visited as part of the national strategy for learner attainment.

50 000 books, including Maths 911, Study Mate and study guides were provided to the 500 Dinaledi schools in 2009. A combined total of 569 mathematics and physical science teachers were trained on subject content knowledge and ICT infrastructure availability was surveyed at 233 of these schools.

There are monthly updates of the number of learning spaces on the Thutong education portal. The portal is constantly monitored and monthly reports are provided on its use. In 2009, guidelines for using the portal effectively were developed and uploaded. In 2009, the feasibility study on ICT in education was completed and an ICT in education report was compiled. The Universal Services and Access Agency of South Africa contributed to the funding of ICT in computer applications technology and IT in schools and a handover report was provided to the provincial education departments.

In 2009, the Kha Ri Gude mass literacy campaign enabled 613 637 learners to attend literacy classes. The programme has reached approximately 1 million of the targeted 4.7 million learners since implementation began 2 years ago. In 2009, the campaign created approximately 40 000 short term jobs. A combined total of approximately 1 700 blind and deaf learners were reached through employing about 190 Braille and deaf educators.

### Expenditure estimates

**Table 14.5 Curriculum Policy, Support and Monitoring**

Subprogramme	Audited outcome			Adjusted appropriation	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
R million							
Curriculum Implementation and Monitoring	64.0	257.9	59.7	71.8	119.9	243.6	255.7
<i>CD: Curriculum Implementation and Monitoring</i>	1.0	1.7	1.9	2.3	14.0	15.9	16.8
<i>Early Childhood Development</i>	2.6	3.9	5.8	11.4	4.4	4.7	4.9
<i>School Curriculum, Senior and FET</i>	24.4	221.7	28.5	25.5	89.8	210.5	221.0
<i>School Curriculum Foundation and Intermediate</i>	33.0	28.0	17.6	26.3	8.1	8.6	9.1
<i>Inclusive Education</i>	3.0	2.6	5.9	6.4	3.5	3.8	3.9
National Curriculum Institute	0.9	1.7	1.9	1.6	4.0	5.0	5.2



Table 14.5 Curriculum Policy, Support and Monitoring (continued)

Subprogramme	Audited outcome			Adjusted	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
R million							
Curriculum and Quality Enhancement Programmes	8.8	17.2	20.9	553.8	762.3	1 013.2	1 113.8
<i>CD: Curriculum and Quality Enhancements Programmes</i>	0.8	1.7	1.1	1.2	1.2	1.3	1.3
<i>Children and Youth Literacy</i>	–	1.9	2.9	3.0	2.4	2.6	2.7
<i>Quality Improvement and Development Support</i>	–	0.6	2.6	2.0	1.9	2.1	2.2
<i>Curriculum Innovation</i>	7.3	12.4	8.9	8.0	4.4	4.7	5.0
<i>Foundations of Learning Campaign and Dinaledi Support</i>	–	–	4.8	538.5	751.2	1 001.3	1 101.3
<i>SD: National Board for FET</i>	0.8	0.5	0.7	1.0	1.2	1.2	1.3
Kha Ri Gude Literacy Project	–	17.1	457.0	443.2	468.1	496.1	520.9
<i>Kha Ri Gude Unit</i>	–	–	5.6	10.2	9.6	9.8	10.2
<i>Kha Ri Gude Mass Literacy Campaign: Earmarked Funds</i>	–	17.1	451.4	433.0	458.6	486.3	510.7
<b>Total</b>	<b>73.7</b>	<b>293.9</b>	<b>539.5</b>	<b>1 070.4</b>	<b>1 354.3</b>	<b>1 757.8</b>	<b>1 895.6</b>
Change to 2009 Budget estimate				532.4	709.7	958.4	1 057.4

**Economic classification**

<b>Current payments</b>	<b>72.2</b>	<b>293.1</b>	<b>536.9</b>	<b>1 069.0</b>	<b>1 273.7</b>	<b>1 487.2</b>	<b>1 585.1</b>
Compensation of employees	18.8	26.3	33.3	39.9	47.3	51.3	53.8
Goods and services	53.4	266.8	503.6	1 029.1	1 226.4	1 435.9	1 531.3
<i>of which:</i>							
<i>Inventory: Stationery and printing</i>	1.4	2.5	90.0	36.6	68.8	72.6	75.5
<i>Property payments</i>	0.0	0.0	0.0	0.1	0.6	0.6	0.6
<i>Travel and subsistence</i>	11.1	7.5	8.6	13.0	9.9	11.6	12.4
<i>Operating expenditure</i>	15.7	201.6	331.8	436.7	1 100.3	1 300.6	1 389.7
<b>Transfers and subsidies</b>	<b>0.9</b>	<b>0.2</b>	<b>0.4</b>	<b>1.0</b>	<b>80.1</b>	<b>270.1</b>	<b>310.1</b>
Provinces and municipalities	0.0	–	–	–	80.0	270.0	310.0
Foreign governments and international organisations	0.1	0.2	0.1	0.1	0.1	0.1	0.1
Households	0.8	0.0	0.3	0.9	–	–	–
<b>Payments for capital assets</b>	<b>0.5</b>	<b>0.4</b>	<b>2.3</b>	<b>0.4</b>	<b>0.5</b>	<b>0.5</b>	<b>0.5</b>
Machinery and equipment	0.5	0.4	2.2	0.4	0.5	0.5	0.4
Software and other intangible assets	–	0.0	0.1	0.0	–	–	0.0
<b>Payments for financial assets</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>73.7</b>	<b>293.9</b>	<b>539.5</b>	<b>1 070.4</b>	<b>1 354.3</b>	<b>1 757.8</b>	<b>1 895.6</b>

**Details of selected transfers and subsidies**

<b>Provinces and municipalities</b>							
<b>Provinces</b>							
<b>Provincial Revenue Funds</b>							
<b>Current</b>	–	–	–	–	–	<b>70.0</b>	<b>100.0</b>
Dinaledi Schools Conditional Grant	–	–	–	–	–	70.0	100.0
<b>Capital</b>	–	–	–	–	<b>80.0</b>	<b>200.0</b>	<b>210.0</b>
Technical Secondary Schools Recapitalisation Grant	–	–	–	–	80.0	200.0	210.0

**Expenditure trends**

Expenditure increased at an average annual rate of 144 per cent, from R73.7 million in 2006/07 to R1.1 billion in 2009/10. The main reason for the increase is the additional allocations for the mass literacy campaign. Expenditure is expected to grow at an average annual rate of 21 per cent over the medium term to reach R1.9 billion. This is because of the additional funds allocated for the workbooks project, the introduction of the technical schools recapitalisation grant in 2010/11, and the Dinaledi schools conditional grant in 2011/12. This

accounts for the 298 per cent increase in the expenditure for the *Curriculum and Quality Enhancement Programmes* subprogramme in 2009/10, and for the increased transfers to provinces from 2010/11.

The increase in expenditure of 303.1 per cent in the *Curriculum Implementation and Monitoring* subprogramme in 2007/08 was due to a once-off allocation, which was mainly for printing, publishing and distributing learner support materials as part of the national recovery plan after the June 2007 educator strike action. This also accounts for the 399.6 per cent growth in goods and services in 2007/08. The growth in expenditure for goods and services from 2006/07 to 2009/10, at an average annual rate of 168.1 per cent, was also due to the introduction of the Kha Ri Gude mass literacy campaign in 2008/09 and the R524 million allocation for workbooks in the 2009 adjustments budget. The initial allocation for workbooks made in the 2009 adjustments budget accounts for the increase in expenditure on learner and teacher support materials from R12.4 million in 2008/09 to R483.6 million in 2009/10. However, this allocation moves to operating expenditure in 2010/11. The other major activity funded from operating expenditure is the *Kha Ri Gude Literacy Project* subprogramme.

Over the medium term, the focus will be on specific interventions to improve educational outcomes. These include the distribution of workbooks, the recapitalisation of technical schools, and the additional resources given to Dinaledi schools. Other projects, like the Kha Ri Gude mass literacy project, will continue to be prioritised as they are expanded over the MTEF period.

### **Programme 3: Teachers and Education Human Resources Development and Management**

- *Education Human Resources Management* is responsible for human resources management, school educators, and educator labour relations. Activities include: education human resource planning, provisioning and monitoring; educator performance management and development; and education labour relations and conditions of service. Funds will mainly be used for the integrated quality management system project.
- *Institutional Development* develops policies and programmes to promote district development and management and governance capacity in education. Activities include school management and governance, whole school evaluation and district development. Funds will mainly be used for compensation of employees and other personnel related costs.
- *Teacher Education* develops policies and programmes to promote the continuing development of teachers, school managers and other educators employed in the basic education system. The subprogramme also evaluates qualifications for employment in education. Activities include continuing professional teacher development and initial teacher education. Funds will mainly be used for the project to develop mathematics and science teachers.

#### **Objectives and measures**

- Improve the quality of teaching by:
  - monitoring the implementation of the teacher performance appraisal system and producing quarterly reports
  - ensuring the establishment of the national education evaluation and development unit by January 2011
  - implementing a performance based contracting and performance appraisal system for school principals and managers by July 2010.
- Monitor the implementation of signed collective agreements on remuneration and conditions of service for educators, in particular the occupation specific dispensation, and analyse the implications of the agreements by producing a report by June 2010 and an updated one in December 2010.
- Improve teaching by monitoring and supporting the pilot of the continuous professional teacher development system and preparing the implementation plan for roll out in 2011/12.
- Improve teacher education by:
  - aligning and updating the policy documents on the criteria for the recognition and evaluation of qualifications for employment in education over the next three years

- evaluating, approving and standardising teacher qualifications and new or revised programmes for teacher education.
- Improve the teacher provisioning model by developing systems to capture up to date data on teacher provision over the medium term.
- Improve school management by March 2011 by:
  - supporting, monitoring and evaluating the implementation of guidelines on school management
  - reviewing the legislation on school governing bodies in the South African Schools Act (1996)
  - supporting, monitoring and evaluating the implementation of the guidelines for representative councils of learners
  - increasing the total number of districts with curriculum or subject advisors in all learning areas.

### **Service delivery focus**

Internal and external evaluations of the advanced certificate in education: school leadership and management were completed in 2009. These evaluations showed that participation in the programme led to improved performance of managers and indicated support among stakeholders for a compulsory entry level qualification for principal posts. They also suggested that the certificate could form the basis for this qualification. Systems for capturing data on the qualifications of all practicing educators are currently being developed for implementation over the medium term to enable the department to identify teachers who are either under or unqualified, or are teaching out of their field.

In 2008/09, all 81 districts were audited and a survey of subject advisors was conducted by the national department. The findings of the audit and survey indicated critical shortages per district and subject area. Provincial departments will use this research for planning purposes. By September 2009, the 75 integrated quality management system moderators appointed since August 2008 had visited 7 918 schools against a targeted 7 500. These visits helped identify gaps in implementing quality management system processes and procedures, which can now be addressed by schools. 8 500 more schools will be visited in 2010. In 2009, the macro indicator report on the monitoring and evaluation framework was published and a report on service delivery in public ordinary schools was completed.

In 2009, guidelines were developed on how schools need to conduct self evaluations to identify areas that affect learner achievement, how to develop and implement school improvement plans, and how to report annually on school progress.

Students who graduate as teachers with support from the Funza Lushaka bursary scheme are intended to fill posts in priority areas for subjects such as mathematics, the sciences, technology subjects, languages and the foundation phase. In 2009/10, approximately 20 per cent (8 542) of students enrolled in initial teacher education programmes across 23 higher education institutions were supported through Funza Lushaka bursaries, worth a total of R383 million, with an average value of R14 000 per bursary. About 1 800 Funza Lushaka students have graduated thus far and have been placed in provincial posts from the beginning of 2010.

## Expenditure estimates

**Table 14.6 Teachers and Education Human Resources Development and Management**

Subprogramme	Audited outcome			Adjusted appropriation	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
R million							
Education Human Resources Management	4.9	6.5	23.6	45.5	65.2	70.4	74.1
CD: Education Human Resources Planning	0.5	0.7	1.4	1.0	12.2	14.0	14.7
Education Human Resource Planning, Provisioning and Monitoring	2.6	1.7	2.7	8.3	2.8	2.9	2.6
Educator Performance and Management Development	–	2.3	17.6	34.0	47.4	50.5	53.6
Education Labour Relations and Conditions of Service	1.8	1.8	2.0	2.2	2.8	3.0	3.2
Institutional Development	14.3	14.3	16.9	19.0	15.6	16.6	17.5
Teacher Education	19.4	152.6	239.9	434.1	432.9	459.0	481.9
CD: Teacher Education	–	0.1	0.9	1.0	1.0	1.0	1.1
Continuing Professional Teacher Development	18.2	150.4	236.0	427.9	427.4	453.0	475.7
SD: Educator Qualifications and Programmes	1.2	1.3	1.2	2.1	2.3	2.4	2.5
Initial Teacher Education	–	0.8	1.8	3.1	2.4	2.5	2.6
<b>Total</b>	<b>38.5</b>	<b>173.4</b>	<b>280.4</b>	<b>498.6</b>	<b>513.7</b>	<b>546.0</b>	<b>573.5</b>
Change to 2009 Budget estimate				396.3	(24.3)	(24.1)	(23.6)

### Economic classification

<b>Current payments</b>	<b>37.0</b>	<b>50.9</b>	<b>99.9</b>	<b>96.5</b>	<b>88.5</b>	<b>96.1</b>	<b>101.2</b>
Compensation of employees	13.1	16.0	29.6	47.0	58.2	66.2	69.6
Goods and services	23.9	34.9	70.3	49.5	30.3	29.9	31.6
of which:							
Travel and subsistence	2.9	3.6	7.1	7.7	7.6	6.7	6.9
Operating expenditure	1.2	2.1	2.6	0.9	0.9	1.1	1.1
<b>Transfers and subsidies</b>	<b>1.3</b>	<b>122.0</b>	<b>180.0</b>	<b>401.6</b>	<b>424.0</b>	<b>449.4</b>	<b>471.9</b>
Departmental agencies and accounts	0.0	122.0	180.0	401.5	424.0	449.4	471.9
Households	1.2	–	–	0.1	–	–	–
<b>Payments for capital assets</b>	<b>0.2</b>	<b>0.4</b>	<b>0.5</b>	<b>0.5</b>	<b>1.2</b>	<b>0.5</b>	<b>0.5</b>
Machinery and equipment	0.2	0.4	0.5	0.5	1.2	0.4	0.4
<b>Payments for financial assets</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>38.5</b>	<b>173.4</b>	<b>280.4</b>	<b>498.6</b>	<b>513.7</b>	<b>546.0</b>	<b>573.5</b>

### Details of selected transfers and subsidies

Departmental agencies and accounts							
Departmental agencies (non-business entities)							
<b>Current</b>	<b>–</b>	<b>122.0</b>	<b>180.0</b>	<b>401.5</b>	<b>424.0</b>	<b>449.4</b>	<b>471.9</b>
South African Council for Educators (SACE)	–	2.0	–	1.5	–	–	–
National Student Financial Aid Scheme (NSFAS)	–	120.0	180.0	400.0	424.0	449.4	471.9

## Expenditure trends

Expenditure increased at an average annual rate of 134.8 per cent, from R38.5 million in 2006/07 to R498.6 million in 2009/10. This growth is mainly due to additional funds allocated for the Funza Lushaka bursary scheme for the supply of newly trained teachers from 2007/08 and is reflected in the *Teacher Education* subprogramme's growing expenditure. This allocation is also responsible for the increase in transfers and subsidies at an average annual rate of 583.4 per cent between 2006/07 and 2009/10 as the National Student Financial Aid Scheme administers the Funza Lushaka bursaries.

Expenditure in this programme is expected to increase marginally over the medium term, at an average annual rate of 4.8 per cent, to reach R573.5 million in 2012/13.

Spending in the *Education Human Resources Management* subprogramme grew at an average annual rate of 110.2 per cent from 2006/07 to 2009/10, mainly due to additional allocations for the integrated quality management system in 2008/09 and the establishment of a national education evaluation and development unit in 2009/10. These new functions also account for the higher consultancy fees over the medium term. The fluctuating trend in training and development spending is due to the initial introduction of a project to develop mathematics and science teachers in 2007/08. This project will be taken over by provincial governments from 2010/11. This accounts for the projected decline in expenditure on training and development from R49.8 million in 2008/09 to R4.6 million in 2012/13.

In an attempt to improve the quality of teaching, the department will support the development and implementation of a continuous professional teacher development system over the MTEF period. The national education evaluation and development unit will be established and the monitoring of the integrated quality management system will continue and will be enhanced as more monitors are appointed in 2010/11.

## **Programme 4: Planning, Quality Assessment and Monitoring and Evaluation**

- *Information Monitoring and Evaluation* develops information systems for the basic education sector, and monitors and evaluates the performance of the basic education system. Activities include: managing the education management information system; research, coordination, monitoring and evaluation; and education management systems. Funds will mainly be used for the education management information system project.
- *Financial and Physical Planning and Analysis* focuses on cross-cutting aspects, such as financial and physical resource planning, and coordination with provinces for implementing national policy. It also provides budgeting support to provinces. Activities include financial planning, physical planning, and economic analysis. Funds will mainly be used for compensation of employees and other personnel related costs.
- *Educational Measurement, Assessment and Public Examinations* promotes the integrity of national school assessments and examinations, provides timely and reliable data on the achievement of learning outcomes, and monitors progress over time. Activities include examinations and assessment in schools, and systemic evaluation. Funds will mainly be used to pay examiners and moderators for the national Grade 12 examinations, for the national assessment of literacy and numeracy in grades 3, 6 and 9 and a transfer to Umalusi.

### **Objectives and measures**

- Improve infrastructure planning and monitoring by:
  - providing up to date information on infrastructure delivery quarterly
  - producing 2 monitoring reports by September and March each year on the implementation of the norms and standards for school infrastructure.
- Improve planning and monitoring of the equitable distribution of education funding in support of education policies by:
  - producing 2 monitoring reports on the implementation of the funding norms by June and December each year
  - developing an updated costed basic minimum package for public ordinary schools by September 2010.
- Reduce the number of underperforming schools by 10 per cent in all provinces in 2010/11 by monitoring and supporting all schools with a pass rate below 60 per cent in the 2009 national senior certificate examinations.
- Improve the management of learner information by implementing the national learner unit record information and tracking system in all public ordinary and special schools by October 2010.

- Improve the monitoring and evaluation of education by producing a report on education macro indicators by March 2011.
- Improve literacy and numeracy by providing independently moderated literacy and numeracy tests to all grade 3, 6 and 9 learners and using the results to direct appropriate support to schools every year.

### **Service delivery focus**

The first phase in the process of standardising reporting and data collection in the education system, which started in 2007/08, was to determine the needs and requirements of the provincial and national education departments. In 2010, this process will yield full integration in the education management information system. A system wide monitoring and evaluation framework of education performance indicators was also developed in 2009.

Since 2008/09, the national education infrastructure management system has been updated regularly and is used for planning and monitoring progress in infrastructure delivery, with all provinces linked to the system database. Provincial infrastructure budgets are monitored monthly and reports are produced quarterly.

The national learner unit record information and tracking system was implemented in 7 440 schools across the country in 2008/09 and contains the records of 3 750 195 learners and 98 514 educators. All schools will be linked to the system over the medium term.

The policy of declaring no fee schools, beginning in January 2007 and extended in 2008, meant that by 2008 over 5 million learners at 14 264 schools were not required to pay school fees, thus removing a barrier to access to education. By 2010, there will be 8 million learners in approximately 19 933 no fee schools.

Grade R funding norms were published in March 2009 and will be implemented in April 2010. Monitoring reports were produced on the preparedness of provinces for the implementation of these norms and the extent of exemptions from school fees in schools in quintiles 3 to 5.

A key deliverable in the department is providing credible and reliable examinations for the national senior certificate. In 2009, 130 examination papers for the national senior certificate were set. To strengthen the implementation of the national senior certificate, new subject assessment guidelines and learning programme guidelines for grades 10 to 12 were developed and distributed to all schools in 2009. The previous curriculum's national senior certificate examinations were conducted in June 2009 and will be offered until 2011 to candidates wishing to complete that qualification.

A key focus for the department over the medium term is to improve literacy and numeracy levels. In 2008, the department provided standardised annual assessments for the first time at some schools for grades 1 to 6 in literacy and numeracy. The results, although not generalisable, provided a baseline for increased assessment support to schools and confirmed the findings of other national studies such as systemic evaluation surveys and international studies that found the performance of 60 per cent of Grade 3 learners was either unsatisfactory or only partially acceptable. In 2009, literacy and numeracy tests, the results of which are generalisable and which will be made available to schools in 2010, were again developed and distributed to all schools with grades 1 to 6. Literacy and numeracy of all grade 3, 6 and 9 learners will be assessed every year and the results of these will be used to develop support programmes. These assessments will be based on work covered by learners in learner workbooks that will be supplied to all learners from grades R to 9 over the medium term as part of a literacy and numeracy support package.

## Expenditure estimates

**Table 14.7 Planning, Quality Assessment and Monitoring and Evaluation**

Subprogramme	Audited outcome			Adjusted appropriation	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09		2009/10	2010/11	2011/12
R million							
Information Monitoring and Evaluation	6.8	24.8	34.5	33.0	42.2	45.8	48.1
<i>CD: Information Monitoring and Evaluation</i>	0.2	0.6	0.6	0.7	12.0	13.7	14.5
<i>Education Management Information Systems (EMIS)</i>	5.6	8.4	9.9	7.5	4.0	4.3	4.5
<i>Research Coordination, Monitoring and Evaluation</i>	1.0	1.5	1.9	1.9	1.9	2.1	2.2
<i>Education Management Systems</i>	–	14.3	22.1	22.9	24.2	25.7	27.0
Financial and Physical Planning and Analysis	14.1	6.9	31.4	11.9	11.3	12.5	13.1
Educational Measurement, Assessment and Public Examinations	58.7	138.6	149.7	88.8	95.2	98.4	104.9
<i>CD: Educational Measurement, Assessment and Public Examinations</i>	6.3	9.8	0.9	0.9	0.9	1.0	1.0
<i>Systemic Evaluation</i>	3.9	12.1	16.7	23.7	35.2	34.8	38.1
<i>SD: Database Management</i>	0.6	0.9	1.7	1.3	1.4	1.5	1.6
<i>Examination Administration Support and IT System Administration</i>	27.0	94.1	97.6	32.7	26.5	28.1	29.5
<i>Examiners and Moderators</i>	13.5	8.8	16.8	13.6	13.8	14.7	15.4
<i>Transfer to Umalusi</i>	7.4	12.9	16.0	16.5	17.4	18.4	19.3
<b>Total</b>	<b>79.7</b>	<b>170.3</b>	<b>215.5</b>	<b>133.6</b>	<b>148.7</b>	<b>156.7</b>	<b>166.1</b>
Change to 2009 Budget estimate				7.2	23.7	24.0	27.5

### Economic classification

<b>Current payments</b>	<b>66.7</b>	<b>149.4</b>	<b>168.7</b>	<b>114.0</b>	<b>130.4</b>	<b>137.8</b>	<b>146.3</b>
Compensation of employees	34.5	51.1	55.3	57.3	54.3	58.4	61.2
Goods and services	32.2	98.4	113.5	56.7	76.1	79.4	85.1
<i>of which:</i>							
<i>Inventory: Stationery and printing</i>	1.0	13.6	5.1	4.4	3.7	19.4	20.4
<i>Travel and subsistence</i>	12.0	15.8	21.6	11.1	14.6	14.8	15.6
<i>Operating expenditure</i>	1.6	29.3	17.9	2.7	24.9	6.5	8.5
<b>Transfers and subsidies</b>	<b>8.4</b>	<b>12.9</b>	<b>38.2</b>	<b>16.5</b>	<b>17.4</b>	<b>18.4</b>	<b>19.3</b>
Provinces and municipalities	0.0	–	22.0	–	–	–	–
Departmental agencies and accounts	7.4	12.9	16.1	16.5	17.4	18.4	19.3
Households	0.9	0.0	0.1	0.0	–	–	–
<b>Payments for capital assets</b>	<b>0.4</b>	<b>2.2</b>	<b>8.6</b>	<b>3.1</b>	<b>0.9</b>	<b>0.5</b>	<b>0.5</b>
Machinery and equipment	0.4	2.0	7.1	2.9	0.9	0.5	0.5
Software and other intangible assets	–	0.2	1.4	0.2	–	–	–
<b>Payments for financial assets</b>	<b>4.2</b>	<b>5.8</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>79.7</b>	<b>170.3</b>	<b>215.5</b>	<b>133.6</b>	<b>148.7</b>	<b>156.7</b>	<b>166.1</b>

### Details of selected transfers and subsidies

<b>Provinces and municipalities</b>							
<b>Provinces</b>							
<b>Provincial Revenue Funds</b>							
<b>Current</b>	–	–	22.0	–	–	–	–
Disaster management grant	–	–	22.0	–	–	–	–
<b>Departmental agencies and accounts</b>							
<b>Departmental agencies (non-business entities)</b>							
<b>Current</b>	7.4	12.9	16.0	16.5	17.4	18.4	19.3
Umalusi Council for Quality Assurance in General and Further Education and Training	7.4	12.9	16.0	16.5	17.4	18.4	19.3

## Expenditure trends

Expenditure grew at an average annual rate of 18.8 per cent, from R79.7 million in 2006/07 to R133.6 million in 2009/10. The growth was mainly in the *Educational Measurement, Assessment and Public Examinations*

subprogramme, and was due to an additional allocation to prepare and implement the national curriculum statement examinations in 2007/08 and 2008/09. This also accounts for the increase of expenditure in compensation of employees, agency and support, and stationery and printing costs in this period, as well as the 400 per cent and 255 per cent growth in expenditure on machinery and equipment in 2007/08 and 2008/09, mainly due to the upgrading of equipment to meet the requirements of setting national examination papers. Expenditure in the *Information Monitoring and Evaluation* subprogramme also increased, mainly due to additional allocations for the education management information system in 2007/08. This also accounts for the increase in expenditure on computer services.

An additional once-off allocation of R22 million made in the 2008 adjusted budget to rebuild and repair schools affected by storms in Mpumalanga and KwaZulu-Natal resulted in an increase in transfers to provinces in 2008/09. The reduction in expenditure on travel and subsistence from R21.5 million in 2008/09 to R11.1 million in 2009/10 was due to cost saving measures implemented by the department in 2009/10.

Expenditure is expected to increase to R166.1 million over the MTEF period, at an average annual rate of 7.5 per cent. This is mainly due to the department's central role in providing credible and reliable examinations for the national senior certificate and the planned literacy and numeracy assessments to be conducted annually for all grades 3, 6 and 9 learners, which remains the spending focus over the medium term.

## **Programme 5: Social Responsibility**

- *Social Inclusion in Education* manages policy, programmes and systems on the creation of a safe learning environment, and facilitates enrichment programmes in schools through collaborative programmes with organisations like the South African Police Service, the United Nations Children's Fund, Boys Town and Girls Town schools, and provincial education departments. Activities include school safety and enrichment programmes. Funding is mainly used for compensation of employees and other personnel related costs.
- *Equity in Education* develops and monitors policies and programmes for promoting gender equity, non-racialism, non-sexism, democratic values in education, and an understanding of human rights in public schools. It advances quality education and promotes access to education in rural and farm schools. Funding is mainly used for compensation of employees and other personnel related costs.
- *Health in Education* manages policies on the overall wellness of educators and learners, and manages and monitors the national school nutrition programme. Funds will mainly be used for transfer payments for the national school nutrition programme and the HIV and AIDS conditional grants to provincial education departments.

### **Objectives and measures**

- Improve gender equity in schools by ensuring that the recommendations for monitoring and evaluation of gender equity in the school education system are implemented by March 2011.
- Improve quality education and promote access to education at 450 rural and farm schools by providing additional support to these schools and monitoring the implementation of all education policies in these schools in 2010/11.
- Contribute to the reduction in the number of teenage pregnancies and ensure that a uniform and rights based approach to managing teenage pregnancy is applied in public schools by implementing the first phase of the strategy on teenage pregnancy in all provinces in 2010/11.
- Improve learning capacity through the national school nutrition programme by ensuring that the programme:
  - continues in all quintile 1 to 3 primary schools and quintile 1 secondary schools on all school days
  - is phased into quintile 2 and 3 secondary schools over the MTEF period.
- Reduce health barriers to learning by rolling out health screening (vision, hearing and immunisation) to all Grade R and Grade 1 learners in 18 priority health districts in 2010.
- Strengthen HIV and AIDS programmes in schools by reviewing current interventions and developing a new integrated and comprehensive programme over the MTEF period.



## Service delivery focus

In 2009, 2 publications were developed to assist in addressing discrimination and promoting social cohesion in schools: Building a Culture of Responsibilities and Humanity in our Schools, and My Country South Africa. Transformative youth dialogues were also promoted in the provinces throughout 2009. To build a culture of human rights in schools, initiatives with non-government organisations such as Project Citizen and Heartlines were introduced in 2009.

A number of provinces established new girls and boys movement education clubs in 2009 and these have been captured on a comprehensive database for monitoring purposes. Learning materials and educator manuals for adult basic education training level 3 and draft learning programmes for adult basic education training level 4 were developed in 2009.

A major focus of all advocacy and communication programmes in 2009 was the guidelines for the prevention and management of sexual violence and harassment in public schools. These guidelines were sent to all primary schools and an exhibition focusing on learners' experiences of sexual violence and harassment was launched, including a focus on the Generations series to provide support for teachers addressing these issues. The media campaign was postponed due to the high costs involved.

The national school nutrition programme, which has been feeding learners in quintile 1 to 3 primary schools since 2004, was successfully extended to 796 129 learners in quintile 1 secondary schools from April 2009. The programme will be extended to learners in quintile 2 and 3 secondary schools in 2010 and 2011 respectively.

The approach towards health screening was reviewed in 2009 to ensure an institutionalised and more sustainable strategy and will be implemented for Grade 1 learners in 2010. In 2009, 103 educators and subject advisors were trained in physical education programmes, which are currently being rolled out to all Grade 1 teachers in quintile 1 schools.

## Expenditure estimates

**Table 14.8 Social Responsibility**

Subprogramme	Audited outcome			Adjusted appropriation	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
R million							
Social Inclusion in Education	8.1	7.8	5.2	8.5	16.0	18.0	19.0
<i>CD: Social Inclusion in Education</i>	0.5	0.7	0.3	0.9	12.1	13.8	14.6
<i>School Safety and Enrichment Programme and Social Issues</i>	7.6	7.1	4.9	7.6	3.9	4.2	4.4
Equity in Education	7.8	15.1	7.4	7.5	7.8	8.2	8.6
Health in Education	1 263.2	1 390.1	2 104.9	2 596.4	3 872.9	4 801.1	5 161.6
<i>CD: Health in Education</i>	5.4	0.8	0.6	1.2	1.3	1.4	1.5
<i>Social Issues Management</i>	1.9	0.4	–	–	–	–	–
<i>Health Promotion</i>	5.7	5.9	4.4	8.8	3.9	4.2	4.4
<i>National School Nutrition Programme</i>	7.7	6.2	7.8	11.1	16.4	17.5	18.4
<i>National School Nutrition Programme: Provincial</i>	1 098.0	1 219.3	1 927.1	2 394.5	3 663.3	4 578.8	4 928.1
<i>HIV and AIDS: Provinces</i>	144.5	157.6	165.0	180.9	188.0	199.3	209.3
<b>Total</b>	<b>1 279.1</b>	<b>1 413.0</b>	<b>2 117.5</b>	<b>2 612.4</b>	<b>3 896.7</b>	<b>4 827.3</b>	<b>5 189.1</b>
Change to 2009 Budget estimate				(1.0)	2.4	2.9	118.2

### Economic classification

<b>Current payments</b>	<b>36.4</b>	<b>35.9</b>	<b>25.2</b>	<b>36.4</b>	<b>44.5</b>	<b>48.4</b>	<b>50.9</b>
Compensation of employees	14.4	12.9	14.8	19.1	25.4	27.0	28.3
Goods and services	22.0	23.0	10.5	17.2	19.1	21.4	22.6
<i>of which:</i>							
<i>Inventory: Stationery and printing</i>	3.5	0.5	0.9	1.6	2.8	2.9	2.9
<i>Travel and subsistence</i>	7.6	6.0	4.3	7.5	5.9	6.8	7.1
<i>Operating expenditure</i>	1.9	10.2	1.5	1.8	2.9	3.1	3.2
<b>Transfers and subsidies</b>	<b>1 242.5</b>	<b>1 376.9</b>	<b>2 092.1</b>	<b>2 575.4</b>	<b>3 851.4</b>	<b>4 778.1</b>	<b>5 137.4</b>
Provinces and municipalities	1 242.5	1 376.9	2 092.1	2 575.4	3 851.4	4 778.1	5 137.4

**Table 14.8 Social Responsibility (continued)**

Subprogramme	Audited outcome			Adjusted appropriation	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
R million							
<b>Payments for capital assets</b>	<b>0.2</b>	<b>0.2</b>	<b>0.1</b>	<b>0.7</b>	<b>0.8</b>	<b>0.8</b>	<b>0.8</b>
Machinery and equipment	0.2	0.2	0.1	0.7	0.8	0.8	0.8
<b>Total</b>	<b>1 279.1</b>	<b>1 413.0</b>	<b>2 117.5</b>	<b>2 612.4</b>	<b>3 896.7</b>	<b>4 827.3</b>	<b>5 189.1</b>

**Details of selected transfers and subsidies**

Provinces and municipalities							
Provinces							
Provincial Revenue Funds							
Current	1 242.5	1 376.9	2 092.1	2 575.4	3 851.4	4 778.1	5 137.4
National School Nutrition Programme Grant	1 098.0	1 219.3	1 927.1	2 394.5	3 663.3	4 578.8	4 928.1
HIV and AIDS (Life Skills Education) Grant	144.5	157.6	165.0	180.9	188.0	199.3	209.3

**Expenditure trends**

Expenditure grew from R1.3 billion in 2006/07 to R2.6 billion in 2009/10, at an average annual rate of 26.9 per cent. This was due to increased allocations for expanding the national school nutrition programme conditional grant. This is also the reason for the increases in transfers to provinces. The planned expansion of this programme to secondary schools began in 2009/10 and the additional oversight required to monitor this expansion accounts for the 29.4 per cent growth in compensation of employees in 2009/10.

Over the MTEF period, expenditure is expected to increase to R5.2 billion at an average annual rate of 25.7 per cent. This is the result of extending the national school nutrition programme conditional grant to secondary school learners attending schools in quintiles 1 to 3.

Expenditure in the *Social Inclusion in Education* and *Equity in Education* subprogrammes fluctuates depending on the number of projects and campaigns undertaken in each year. This is also the reason for the fluctuations in operating expenditure, and expenditure in agency and support/outsourced services.

The support for and monitoring of the expansion of the national school nutrition programme to include learners in quintiles 1, 2 and 3 secondary schools is the main focus of this programme over the medium term.

## Additional tables

**Table 14.A Summary of expenditure trends and estimates per programme and economic classification**

Programme	Appropriation		Audited outcome	Appropriation			Revised estimate
	Main	Adjusted		Main	Additional	Adjusted	
R million	2008/09		2008/09	2009/10			2009/10
1. Administration	132.7	132.7	131.5	149.7	9.7	159.3	155.1
2. Curriculum Policy, Support and Monitoring	446.8	562.0	539.5	538.1	532.4	1 070.4	787.6
3. Teachers and Education Human Resources Development and Management	280.8	276.8	280.4	502.3	(3.7)	498.6	495.8
4. Planning, Quality Assessment and Monitoring and Evaluation	181.7	200.8	215.5	126.4	7.2	133.6	152.8
5. Social Responsibility	1 786.8	2 135.0	2 117.5	2 613.5	(1.0)	2 612.4	2 606.6
<b>Total</b>	<b>2 828.9</b>	<b>3 307.2</b>	<b>3 284.4</b>	<b>3 929.9</b>	<b>544.6</b>	<b>4 474.4</b>	<b>4 197.9</b>
<b>Economic classification</b>							
<b>Current payments</b>	<b>863.8</b>	<b>994.5</b>	<b>949.8</b>	<b>923.1</b>	<b>532.9</b>	<b>1 456.0</b>	<b>1 179.5</b>
Compensation of employees	179.8	189.4	186.3	217.1	12.8	229.9	251.4
Goods and services	683.9	805.2	763.6	705.9	520.1	1 226.1	928.1
<b>Transfers and subsidies</b>	<b>1 958.2</b>	<b>2 305.9</b>	<b>2 321.7</b>	<b>3 000.1</b>	<b>9.6</b>	<b>3 009.7</b>	<b>3 009.7</b>
Provinces and municipalities	1 751.0	2 098.2	2 114.1	2 571.9	3.5	2 575.4	2 575.4
Departmental agencies and accounts	196.1	196.1	196.2	416.6	1.5	418.1	418.1
Foreign governments and international organisations	11.0	11.1	10.5	11.5	–	11.5	11.5
Non-profit institutions	0.1	0.1	0.1	0.1	–	0.1	0.1
Households	–	0.5	0.8	–	4.6	4.6	4.6
<b>Payments for capital assets</b>	<b>6.9</b>	<b>6.8</b>	<b>12.8</b>	<b>6.7</b>	<b>2.1</b>	<b>8.8</b>	<b>8.8</b>
Machinery and equipment	6.5	6.6	11.2	6.7	1.8	8.5	8.5
Software and other intangible assets	0.4	0.1	1.5	0.0	0.2	0.3	0.3
<b>Payments for financial assets</b>	<b>–</b>	<b>–</b>	<b>0.1</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>2 828.9</b>	<b>3 307.2</b>	<b>3 284.4</b>	<b>3 929.9</b>	<b>544.6</b>	<b>4 474.4</b>	<b>4 197.9</b>

**Table 14.B Summary of personnel numbers and compensation of employees**

	Audited outcome			Adjusted appropriation	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
<b>Permanent and full time contract employees</b>							
Compensation (R million)	96.3	120.8	149.6	184.6	205.1	219.8	231.3
Unit cost (R million)	0.2	0.3	0.3	0.3	0.4	0.4	0.4
<i>Administration</i>	0.2	0.2	0.2	0.3	0.3	0.3	0.3
<i>Curriculum Policy, Support and Monitoring</i>	0.2	0.2	0.3	0.4	0.4	0.5	0.5
<i>Teachers and Education Human Resources Development and Management</i>	0.1	0.1	0.2	0.3	0.3	0.4	0.4
<i>Planning, Quality Assessment and Monitoring and Evaluation</i>	0.3	0.3	0.4	0.4	0.3	0.4	0.4
<i>Social Responsibility</i>	0.3	0.2	0.3	0.3	0.4	0.4	0.5
Personnel numbers (head count)	425	453	522	533	544	544	544
<b>Part time and temporary contract employees</b>							
Compensation (R million)	18.9	26.9	33.3	41.2	45.7	49.0	51.6
Unit cost (R million)	0.1	0.1	0.2	0.2	0.3	0.3	0.3
Personnel numbers (head count)	151	182	203	166	169	169	169
<b>Total for department</b>							
<b>Compensation (R million)</b>	<b>117.0</b>	<b>150.4</b>	<b>186.3</b>	<b>229.9</b>	<b>255.4</b>	<b>273.8</b>	<b>288.1</b>
<b>Unit cost (R million)</b>	<b>0.2</b>	<b>0.2</b>	<b>0.2</b>	<b>0.3</b>	<b>0.3</b>	<b>0.4</b>	<b>0.4</b>
<b>Personnel numbers (head count)</b>	<b>656</b>	<b>738</b>	<b>767</b>	<b>730</b>	<b>745</b>	<b>745</b>	<b>745</b>

**Table 14.C Summary of expenditure on training**

	Audited outcome			Adjusted appropriation	Medium-term expenditure estimate		
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
Compensation of employees (R million)	117.0	150.4	186.3	229.9	255.4	273.8	288.1
Training expenditure (R million)	1.6	2.8	6.5	1.7	2.5	2.4	2.5
Training as percentage of compensation	1.4%	1.9%	3.5%	0.7%	1.0%	0.9%	0.9%
Total number trained in department (head count)	370	364	316	122			
<i>of which:</i>							
<i>Employees receiving bursaries (head count)</i>	26	26	24	29			
<i>Interns trained (head count)</i>	80	103	42	31			
Households receiving bursaries (R million)	–	120.0	180.0	400.0	424.0	449.4	471.9
Households receiving bursaries (head count)	–	11 678	20 571	45 714			

**Table 14.D Summary of departmental public private partnership (PPP) projects**

Project description: Setheko Consortium	Project annual unitary fee at time of contract	Budgeted expenditure	Medium-term expenditure estimate		
		2009/10	2010/11	2011/12	2012/13
R million					
<b>Projects signed in terms of Treasury Regulation 16</b>	–	<b>57.1</b>	<b>96.7</b>	<b>102.7</b>	<b>108.3</b>
PPP unitary charge	–	54.6	96.7	102.7	108.3
Advisory fees	–	2.5	–	–	–
<b>Total</b>	–	<b>57.1</b>	<b>96.7</b>	<b>102.7</b>	<b>108.3</b>

**Disclosure notes for projects signed in terms of Treasury Regulation 16**

Project name	New Head Office Building
Brief description	Finance, design, construction, operation and maintenance of new serviced accommodation
Date PPP agreement was signed	2007/04/20
Duration of PPP agreement	27 years (2 years construction, 25 years service)
Escalation index for unitary fee	CPIX
Net Present Value of all payment obligations discounted at appropriate duration government bond yield	R1 576 044 149
Variations / amendments to PPP agreement	Variation 1: Enlargement of building approved on the 18 of January 2008. Variation 2: Upgrading of certain facilities approved on 28 July 2009.
Cost implications of variations/amendments	Financial Close: Real Annual Unitary Payment Base Date 1 Oct 2006 (Excl Vat) R71 350 877.00 VO1: Real Annual Unitary Payment Base Date 1 Oct 2006 (Excl Vat) R76 710 526.00. VO2 Real Annual Unitary Payment Base Date 1 Oct 2006 (Excl Vat) R 96 700 000.00
Significant contingent fiscal obligations including termination payments, guarantees, warranties and indemnities and maximum estimated value of such liabilities	Maximum exposure on termination for default by the Department of R1 156 385 155.00 in year 2011, March and R1 060 072 172.00 in year 2023, March for default by the Private Party.