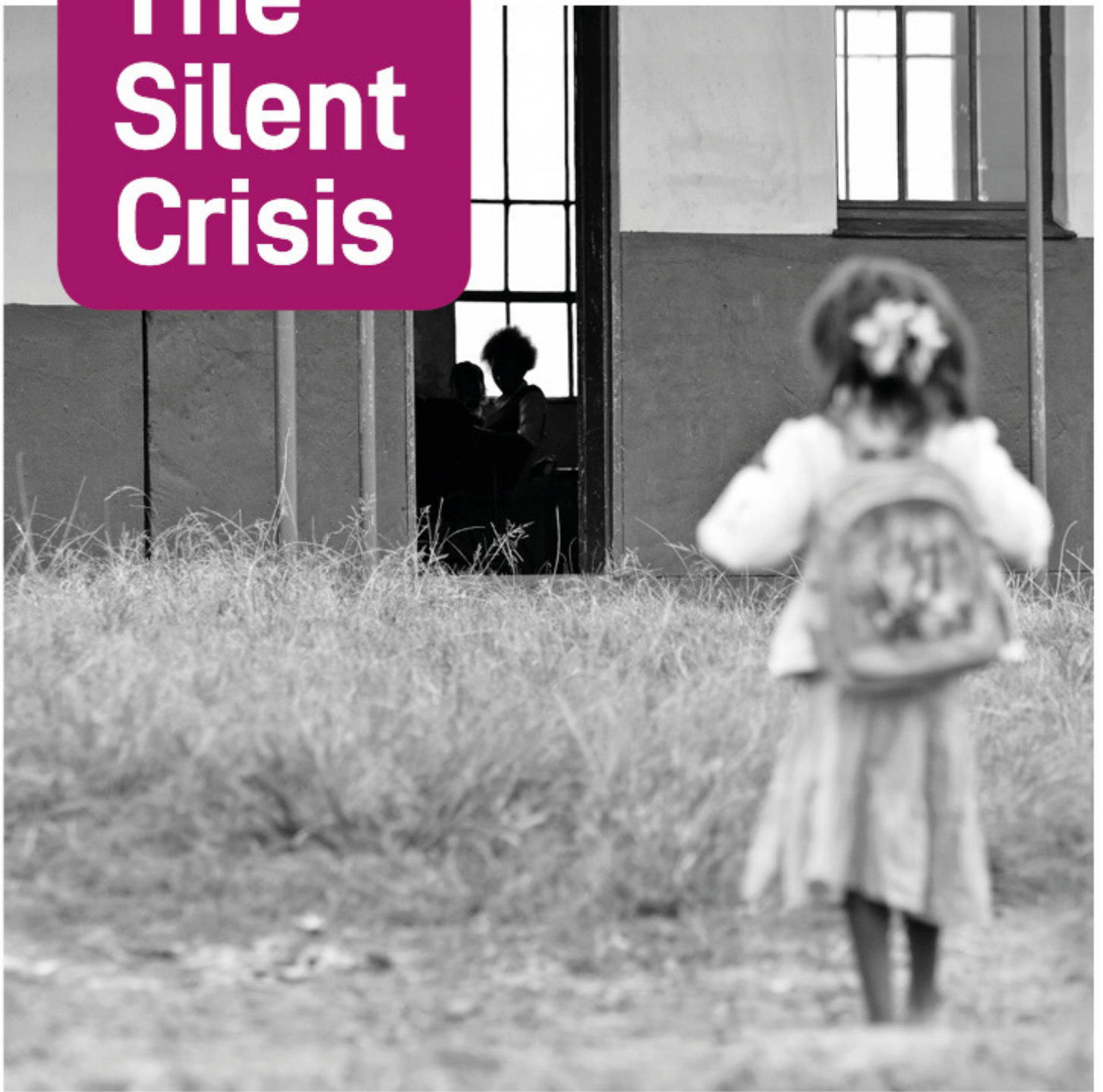


# The Silent Crisis



**TWO**

**What's wrong  
with our  
education  
system?**



## **About CDE**

The Centre for Development and Enterprise (CDE), an independent policy research and advocacy organisation, is South Africa's leading development think tank. Since its establishment in 1995, CDE has been gathering evidence, generating innovative policy recommendations, and consulting widely on issues critical to economic growth, employment and democratic consolidation. By examining South African and international experience, CDE formulates practical policy proposals outlining ways in which South Africa can tackle major social and economic challenges.

CDE has a special focus on the role of business and markets in development. CDE disseminates its research and proposals to a national audience of policymakers, opinion formers and the wider public through printed and digital publications, which receive extensive media coverage. Our track record of successful engagement enables CDE to bring together experts and stakeholders to debate the policy implications of research findings.

Series Editor: Ann Bernstein

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Photo credit: A young South African girl stands outside of school, nervous to enter on her first day of class, by Getty Images

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## **The Silent Crisis**

The failure to meaningfully transform South Africa's dysfunctional schooling system, despite significant public expenditure, is the quiet crisis and disaster of the democratic era. Tragically, while some reform measures in the 2000s proved successful, these gains did not last and have now been reversed during Covid. South Africa remains at the bottom of all international tables on learning outcomes: reading, maths, science. As a result, the majority of poor, mainly black, children in South Africa still do not receive the education they need to escape poverty. This is a national emergency that must be addressed.

In this series of reports, CDE identifies the root cause of this failure and makes the case for fundamental, systemwide reform that focuses on improving the quality of learning in the classroom. South Africa needs a President committed to education reform as a priority and a Minister and team of education leaders who can design and implement an effective reform agenda. This will require decisions that disrupt the status quo and those who benefit from the current dysfunction. It will also require all those South Africans who will benefit from and care about a much more effective and more equal education system of good quality, to mobilise in favour of reform.

This report is one of five in a CDE series on diagnosis, priorities and recommendations for basic education reform.

- ONE: South Africa's failing education system
- **TWO: What's wrong with our education system?**
- THREE: The forgotten story of state capture in education
- FOUR: Lessons for education reformers
- FIVE: Time to fix South Africa's schools

## List of acronyms in this series

ANA	Annual National Assessment
CAPS	Curriculum and Assessment Policy Statement
DAS	Development Appraisal System
EE	Equal Education
EGRS	Early Grade Reading Study
FET	Further Education and Training
HLO	Harmonised Learning Outcomes
IQMS	Integrated Quality Management System
MPAT	Management Performance Assessment Tool
NAPTOSA	National Professional Teachers' Organisation of South Africa
NECT	National Education Collaboration Trust
NEEDU	National Education Evaluation and Development Unit
NEIMS	National Education Infrastructure Management System
NIAF	National Integrated Assessment Framework
NIDS-CRAM	National Income Dynamics Study – Coronavirus Rapid Mobile Survey
NSNP	National School Nutrition Programme
PEU	Professional Educators' Union
PILO	Programme to Improve Learning Outcomes
PIRLS	Progress in International Reading Literacy Study
PISA	Program for International Student Assessment
SACE	South African Council for Educators
SACMEQ	Southern and Eastern Africa Consortium for Monitoring Educational Quality
SADC	Southern African Development Community
SEA	Schools Evaluation Authority
SNTE	Sindicato Nacional de Trabajadores de la Educación
TIMSS	Trends in International Mathematics and Science Study
UNE	Unión Nacional de Educadores

# What's wrong with our education system?

## Introduction

In Report ONE, CDE documented the poor learning outcomes and unique inefficiency of the country's schooling system. This report argues that the Department of Basic Education's (DBE) foremost priority must be to deliver better quality education for all its learners. This means tackling the root causes of dysfunction in a coordinated manner.

In simple terms, the amount of learning that takes place in any classroom will be determined by how well teachers teach and how well learners learn. But what determines the abilities of teachers and learners? Which are the fundamental and which are the proximate causes of learning levels? How should we think about the priorities and approaches for reform that are most likely to bring about the rapid improvement in learning levels the country needs?

Many people in the media, non-government organisations (NGOs), and academics have focussed their education advocacy on poor infrastructure, school violence and other social ills. These are, without doubt, important concerns meriting intervention. However, this focus has tended to divert attention and detract from the DBE's central objective of improving the learning that takes place in our classrooms. This is the critical performance requirement for the department and the country.

CDE's research, supported by the top education experts in the country, reveals that there are four major reasons for South Africa's uniquely underperforming schooling system: the apartheid legacy; weak teacher knowledge and unmotivated teachers; a lack of accountability throughout the system; and finally, a captured education bureaucracy with insufficient competence. While the first of these has already been addressed directly, by equalising schooling access and introducing progressive spending, the other three challenges and obstacles to progress are not being tackled with appropriate measures or sufficient vigour.

**“We can no longer avoid taking on the tough issues, such as the dysfunctional condition of the education bureaucracy”**

We can no longer avoid taking on the tough issues, such as the dysfunctional condition of the education bureaucracy.

International experience and the literature on education reform strongly suggest that we have to address bureaucratic inefficiencies and shortcomings systematically. Only by doing this can we expect to see the kinds of improvements we desperately need. All the major factors holding back learning – poor teaching, weak accountability mechanisms and a compromised education bureaucracy – have to be fixed if learners are to receive better education. That is what global governance and reform experts call 'whole system reform'.

## The fundamental causes of South Africa's inefficient education system

CDE has conducted in-depth research on the country's basic education system, reviewed local and international literature and spoken to some of the top academic experts on education systems in South Africa and around the world to understand what makes us as uniquely inefficient as we are. The key conundrum to explain is that, although South Africa's level of expenditure on education is relatively high (similar to high-performing Scandinavian countries), our learning outcomes are much worse than any other comparable country, and even many poorer countries (including Morocco, Kenya and Vietnam). While the reasons for this are multiple, what follows constitutes a broad agreement amongst experts as to the root causes of our uniquely dysfunctional systems.

### A legacy of inequality

Across the world, poor areas tend to produce bad schools and rich areas tend to produce good schools.<sup>1</sup> According to education experts Professor Nic Spaull and Dr Stephen Taylor, "research consistently demonstrates that a child's socio-economic background is the largest factor in determining learning outcomes".<sup>2</sup> South Africa is no exception to this trend. Poverty, inequality, hunger, crime and parental education levels are interconnecting reasons behind poor education outcomes in South Africa, particularly among predominantly black and/or rural communities.

### Early childhood development and the basic education system

Another important aspect of poor and unequal learning outcomes is our low level of early childhood development (ECD) attendance. The latest pre-pandemic data show that 36.8 percent of 0-4 year-olds attended a formal ECD centre. Researchers have found that there has been a subsequent drop in ECD attendance rates as a result of Covid-19. Although this had almost recovered fully by May 2021, ECD attendance remains out of reach for the majority of young children.<sup>56</sup>

Improving ECD attendance can be an important complement to wider education system reforms. The DBE took over responsibility for ECD in 2022, which will hopefully contribute towards aligning ECD and basic education objectives and practices. The international evidence shows that access to pre-school for learners aged 3-5 can make a significant difference to their future performance. However, it also shows that these gains can be effectively eradicated if a child is then thrown into a poorly functioning basic education system. Most experts agree that we cannot expect higher ECD attendance rates to magically result in much better learning outcomes if we do not change the way the entire basic education system operates across all levels.

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The country's history is a key factor in poor performance today. During apartheid, the government created a segregated system and deliberately set out to provide black students with an inferior 'Bantu' education. At its peak, it spent around 20 times more on every white student than it did on every black student; this ratio remained highly unequal at around three to one in 1994.<sup>3</sup> Teacher training was also of differential quality and

black teachers were paid less than their white counterparts, with the result that teaching standards were kept low nationally. (Coloured and Asian teachers and pupils received intermediate amounts.) Finally, the education curricula were differentiated, with more technical and vocational subjects for black learners and fewer opportunities to study mathematics and science. Overcoming these inequities was always going to be an enormous challenge.

The DBE has rightly argued that "this apartheid legacy will remain present for many years to come". However, the impact of apartheid is weakening with each year that passes, and will continue to diminish, while the responsibility of current education officials and educators for the present situation will only grow.<sup>4</sup> The question we have to ask is where we reasonably should expect to be by now and how far short we are of that point.

We need to address poverty and inequality in as many ways as possible, and doing so will likely create a positive feedback loop that improves education outcomes. However, this is not the DBE's mandate; it would be unfair and unrealistic to expect the department to address these social ills. The DBE should focus on what it can control: enhancing the functioning of the schooling system and the outcomes it achieves. At the same time, improving education quality should enhance job prospects and income for people in poor areas. Seen in this way, better education can also be a route out of poverty.

**"Improving training without changing the way teachers are incentivised and supported will not reap optimal rewards. The two must be done in conjunction"**

### **The quality and commitment of our teachers**

Teaching is a vital and immediate determinant of learning outcomes. As founder of Future Nation schools Sizwe Nxasana says, "There is no education system that can be better than the quality of its teachers."<sup>5</sup>

There are two immediate factors that contribute to poor teaching levels. The first is that many teachers lack the capabilities (content knowledge and pedagogical skills) to teach better. The second is that a non-trivial number lack the willingness to do so. Both factors are evident in South Africa's schools, and the two are linked in important ways.

Many studies support the conclusion that South African primary school teachers generally exhibit poor subject content knowledge in languages and maths: they have an incomplete understanding of both the requirements of the curriculum and how to teach it effectively. The 2013 SACMEQ study found that only 41 percent of South African Grade 6 maths teachers were rated as having a "good proficiency" in their dedicated subject, far lower than their peers in Zimbabwe (87 percent) and Kenya (95 percent).<sup>6</sup> According to education expert Professor Nic Spaull, four out of five teachers in all public schools lack the content knowledge and pedagogical skills to teach their subjects. For example, 79 percent of Grade 6 maths teachers in 2013 scored below 60 percent on a Grade 6 maths test.<sup>7</sup> In 2016, the National Education Evaluation and Development Unit (NEEDU) found that "87 percent of teachers in the 134 rural schools visited did not have a good method to teach foundation level learners how to read and even when teachers identified these struggling learners the teachers did not always know how to help these learners".<sup>8</sup> These are alarming statistics.

Better pre-service teacher training and in-service support is clearly needed. Education experts like Dr Nick Taylor and Dr Nicky Roberts have argued that the training offered by universities is not suitable for the candidates they are attracting. Students seeking to become primary school teachers – the most critical schooling phase – are weaker than all their other peers, entering universities with only a shaky grasp of language and mathematics fundamentals.<sup>9</sup> Astonishingly, university programmes do very little to ensure the teachers they certify can teach reading and mathematics effectively.<sup>10</sup> One of the largest education faculties in the country was found in 2014 to allocate no more than 7.5 percent of time over the four years of the degree to the study of mathematics, while at others it is as low as 2.5 percent. This may explain why a majority of final year Bachelor of Education (B.Ed) students score less than 40 percent in a primary school level mathematics test.<sup>11</sup>

In-service training is also poor. The only method employed at scale in South Africa is a 'train-the-trainer' approach, despite there being no evidence that this makes any difference. The trainers of teachers are subject advisors, but at a ratio of 500:1, there are too few of them to conduct proper training.<sup>12</sup> Subject advisors are meant to undertake two visits per school per term (eight in a year), but 34 percent of teachers only received one visit per year.<sup>13</sup> On top of this, even the subject advisors lack the relevant knowledge – scoring an average of 50 percent on tests measuring how to teach reading.<sup>14</sup> It is therefore no surprise that many teachers lack the knowledge and skills to do their jobs properly.

### **A looming teacher shortage crisis?**

Research released by academics at Stellenbosch University's Research on Socio-economic Policy (RESEP) in December 2022 found that there is almost certainly going to be a wave of teacher retirements over the ensuing decade. As of 2021, half of public school teachers were aged 50 or more, while a quarter were 55 or more. Since public teachers can retire by age 60 and must do so by age 65, the academics expect that fully half of all 2021 teachers will retire by 2030. This means that the number of new teachers in government schools joining the system will have to increase from about 24,500 in 2021 to between 32,000 and 42,000 per year, depending on policy decisions regarding class sizes.

The number of new teacher graduates was 28,000 in 2019 (up from just 9,000 at the start of the decade), suggesting that either many new teacher graduates will have to be produced or that alternative mechanisms for increasing teacher supply, such as hiring skilled teachers from abroad, will have to be pursued. Worryingly, simply producing additional teacher graduates will not suffice. One reason is that the quality of initial teacher education is so poor. Another is that PEDs are not hiring teacher graduates. In 2021, only 50 percent of university graduate teachers were hired, compared with 75 percent in 2015. As researcher Poppie Ntaka explains, "This is because teacher salaries are growing at a faster rate than what is being allocated to the education budget."<sup>57</sup> In the trade-off between higher teacher salaries and higher numbers of (better) teachers, higher salaries have won.

CDE, 2023



In addition, there are members of our teaching corps who simply refuse to fulfil their basic duties. To illustrate, South Africa's teacher absenteeism rate, which basic education minister Angie Motshekga has said is the highest of all the SADC countries,<sup>15</sup> was 10 percent in 2017.<sup>16</sup>

On average, only 66 percent of classroom time is used for teaching and educational activities, compared to the average of 78 percent in OECD countries.<sup>17</sup>

The conclusion to draw from this is that significant improvements would result if teachers were better managed and more motivated to do the basics of their job, such as spending the requisite time on the tasks they are paid for. Reforming the system so that teachers are supported and better incentivised to do their best can potentially deliver significant improvements even in circumstances where teachers have subpar subject content knowledge.<sup>18</sup> When teachers feel incentivised to improve, they are also much more likely to seek out training opportunities and work harder to teach better. Until the system discourages shirking and using the minimum of effort, training interventions will fail to realise their full potential. To put it another way, improving training without changing the way teachers are incentivised and supported will not reap optimal rewards. The two must be done in conjunction.

Poor teaching is holding back the performance of learners, particularly in poor areas. Good schools are dependent on good teachers. Getting better teachers should therefore be a primary objective for the DBE. As World Bank Global Director for Education and former Peruvian minister of education Jaime Saavedra puts it, "Given the essential role they play, addressing the learning crisis requires supporting teachers, who are the single most important driver of how much students learn in school."<sup>19</sup>

### **Accountability deficits throughout the system**

In the global literature on service delivery, there is a wide-ranging consensus that strong systems of accountability are key for overall performance. The South African basic education system fails to measure up to this ideal by quite a margin, as is recognised by the DBE in its 2020 Action Plan: "Insufficient discipline and accountability in the system, from the classroom up to the offices of some senior managers in the administration, continues to be a hurdle in the path of development."<sup>20</sup>

**"Principals need powers if they are to be held accountable"**

One source of this lack of accountability is the numerous failures to introduce proper performance management processes into the system. These reforms have been opposed by the South African Democratic Teachers Union (SADTU), the country's dominant teacher union, leading to considerably diluted mechanisms.

The first initiative under the democratic government to evaluate teacher performance was the 1998 Development Appraisal System (DAS). Reflecting union wishes, DAS was delinked from salary determination and working conditions, relying instead heavily on peer evaluation. A teacher could only be evaluated if attempts had been made to make the teacher more proficient and effective. In 2003, under pressure to improve the system, the DBE introduced, initially with SADTU's support, the Integrated Quality Management System (IQMS). But this system also relied mostly on teacher self-evaluations and, unsurprisingly, produced highly problematic results. Under the IQMS, teachers could be awarded a progression in their salary depending on how well they performed, but performance evaluation was determined by teachers and their peers. Despite this, the IQMS still

met with resistance from SADTU after it was implemented.<sup>21</sup> After SADTU called for appraisals to be de-linked from remuneration, a new performance management agreement called the Quality Management System (QMS), first mooted in 2009, was introduced after 11 years of protracted negotiations, taking effect in 2021 (for principals) and 2022 (for teachers). Under the new evaluation system, educators are expected to conduct self-appraisals and be appraised by their immediate supervisors through biannual lesson observations. There is no longer any connection between a teacher's performance and their pay, at least in practice: although annual salary increases of 1.5 percent are technically dependent on a teacher being rated 'acceptable' under the QMS, 99.9 percent are rated as such and receive the increase.<sup>22</sup>

Compounding this teacher accountability deficit are the inadequate accountability mechanisms for school leadership teams and education officials at district and provincial level. For example, there are no independent competency assessments for principals in seven of South Africa's nine provinces. Personnel and Salary System (PERSAL) data from 2012 reveal that only 70 percent of incoming principals met the minimum criteria for school leadership, which are in any event inadequate – principals need only seven years' teaching experience and require no managerial expertise.<sup>23</sup>

**“The only way to measure performance is to have much better data on how learners across all the grades and the entire country are performing”**

At the same time, good principals are hamstrung by the system. They are not granted enough power to appoint and manage the teachers under their supervision. With so little power, even capable principals cannot be held fully responsible for the performance of their schools, whether by education districts or local communities. This lack of accountability was recognised in 2012 in the National Development Plan 2030 (NDP), which argued that “principals need powers if they are to be held accountable”.<sup>24</sup> This is especially important because principals do not function in isolation; they are embedded in a network of relationships within the bureaucracy and with teachers, school governing bodies (SGBs), parents, learners and members of the local community. These relationships are key determinants of school level outcomes.

These problems flow up to the district level, where they are particularly pronounced. In 2020, the DBE acknowledged that there had been no “improvements in the effectiveness of districts in recent years”, despite efforts to improve data collection and monitoring.<sup>25</sup> The ministerial task team (MTT) appointed in 2014 to investigate the 'Jobs for Cash' scandal (discussed in detail in Report THREE) outlined some of the challenges for school governance structures created by struggling, overwhelmed district officials:

If Districts ... are too weak and loathe to empower schools and their governing bodies it will be because of a combination of inappropriate appointments of office-based staff and the determination of teacher unions to use them for their own ends ... It is possible that the centre of the problem lies within the [DBE]'s notorious incapacity to implement policy and sustain routine monitoring and supporting tasks.<sup>26</sup>

The recognition that many school governing bodies (SGBs) are malfunctioning – 62 percent of them were found to be “minimally effective” by the 2017 School Monitoring Survey – and that many have been captured by vested interests have led to calls to reduce their power and to subject them to greater control from the centre.<sup>27</sup> The real challenge is how to ensure that, from the national to the community level, the system is run by people whose primary goal is to promote effective learning in our schools, and who are held to account for the achievement of that goal.

Almost all education experts agree that reliable evidence of performance is imperative for understanding how to improve the system. Data matter for pinpointing areas requiring improvement, while decentralised experiments make it possible to learn how to institutionalise workable practices across the system. Moreover, credible information also matters to both reform leaders and pressure groups, who can use the information as a way to point to deficits and to ground their calls for reform. High-quality data on measurable parameters can also show teachers what they need to work on.

Le Roux van der Westhuizen, Executive Trustee of the Millennium Trust, an NGO which works to ensure South Africa produces high-quality education, argues that "no one really knows how well education departments, schools and teachers in South Africa are performing". This is a grave problem because, as he puts it, "It is very hard to hold anyone to account if we don't know what impact their actions have had on the performance levels of the system." Van der Westhuizen argues that "Some district officials and principals feel somewhat answerable for going through the motions, but not for taking steps to generate actual improvements in education."<sup>28</sup>

### **A compromised and incompetent bureaucracy**

South Africa's education system is large and complex. The DBE, with a staff of more than 700 people, oversees nine PEDs (employing more than 30,000 administrative and public service staff<sup>29</sup>), which are collectively in charge of more than 80 education districts.<sup>30</sup> This bureaucratic machinery is responsible for more than 25,000 public schools, each with its own SGB. PEDs employ South Africa's public school educators, of which there are about 405,000 (320,000 of whom are teachers).<sup>31</sup> From Grade R to 12, the public school system in 2022 is teaching 13 million learners.<sup>32</sup>

### **Broken links in the accountability chain**

The national department is responsible for policymaking, resources and regulating the education sector. The provincial departments, which receive the majority of the budget, are responsible for implementing national policy, teacher recruitment and payment, and direct school oversight. Provinces differ substantially in their ability to deliver on these functions. Districts in the education system are responsible for collecting and analysing data to inform planning, providing support for schools and holding principals accountable for school performance. SGBs, in which school parents are legally supposed to comprise the majority of members, oversee the recruitment of the principal and senior teachers.

The broken links in the accountability chain are such that the DBE cannot hold provincial officials to account, since PEDs do not report to the national department; districts find it difficult to hold principals to account, since they do not hire them; and principals find it difficult to hold teachers to account, since they do not appoint them or manage their contracts. On top of this, local communities lack sufficient information on school results to be able to hold principals to account. For there to be an effective system of accountability, all these links need to be fixed.

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This is one of the country's largest management challenges, one which requires extensive coordination and significant management capabilities. Although any bureaucracy of this size will face challenges, CDE's research indicates that, despite the fact that there are capable people within the DBE and in some of the better-performing PEDs, overall, South Africa's education bureaucracy fails to function at an acceptable level. As discussed further in Report THREE, corruption, cadre deployment and conflicts of interests have kept the education administration in a low-capability trap.

South Africa's provinces differ markedly both politically and institutionally, which helps to explain the differing educational outcomes across the country. *The Politics and Governance of Basic Education* by Professor Brian Levy and other experts on public service presents a comparative analysis on the Western Cape and Eastern Cape PEDs.<sup>33</sup> The authors find that "differences in bureaucratic performances, rather than demographic or resource differences, account for the Western Cape's superior educational outcomes".<sup>34</sup> This is a clear indicator that the system in which education is delivered matters greatly for the quality of its delivery.

**"Some district officials and principals feel somewhat answerable for going through the motions, but not for taking steps to generate actual improvements in education"**

According to the analysis, the Western Cape performs well on "the core bureaucratic tasks of managing resources; assigning personnel to where they are most needed; [and] monitoring and managing on the basis of performance", while the Eastern Cape "performs poorly".<sup>35</sup> At a national level, the bureaucracy looks more like the Eastern Cape than the Western Cape.

The Department of Planning, Monitoring and Evaluation's annual Management Performance Assessment Tool (MPAT) reviews, reveal that the DBE is not fully compliant with the relevant legal and regulatory requirements. The MPAT involves a self-assessment by a government department, which is then subject to independent moderation by policy experts. It assesses a department on four criteria: human resource and systems management; strategic management; governance and accountability; and financial management. These administrative and governance systems exist to support accountability and the department's delivery of education. Between the MPAT's inception in 2011 and the final report in 2018, the DBE's performance had deteriorated in all but strategic management.<sup>36</sup> So, by the department's own admission, its performance has been inadequate.

An issue that is more difficult to catalogue, but which is borne out by Levy et al's research, is the extent to which accountability within the structures of the bureaucracy is confined to filling out the correct forms and producing the appearance that actions have been undertaken. These 'box ticking' exercises are frequently delinked from actual outcomes. Some district officials and principals, it would seem, feel somewhat answerable for going through the motions, but not for taking steps to generate actual improvements in education. This 'process compliance' mentality has hampered the progress of even better run and resourced PEDs like the Western Cape. The result is that "a school seemingly is compliant with formal processes, but in practice is locked into a low-level equilibrium of mediocrity".<sup>37</sup>

The impact of the above phenomena on the bottom end of the education hierarchy is clear. Where PEDs do not function as intended, they cannot hold district heads to account. These heads, in turn, are unable to ensure that principals run schools as they should, with the effect that teacher performance is not properly assessed. Lacking incentives (and often the knowledge and support) to improve, teachers remain trapped in a low-level equilibrium.

### **The impact of the bureaucracy on learning outcomes: A natural experiment**

In 2005, South Africa's provincial boundaries were redrawn. The effect was that 710 schools across the country were placed under different provincial administrations, of which 151 offered Grade 12. Drs Gustafsson and Taylor used this natural experiment to explore the impact different public administrations had on learning outcomes. They found that schools that moved into the jurisdiction of a better functioning PED – such as from Limpopo to Mpumalanga, which constituted only a very slight change – a school's performance was lifted by 0.3 standard deviations between 2008 and 2013. Gustafsson and Taylor labelled these as "significant and fairly rapid impacts", equivalent to a rate that was half of the fastest global gains in international benchmarking tests. They proved that these improvements were caused by the simple fact of better administration of schools and ruled out increased spending per learner and changes in principals or teachers as factors. As they conclude, "improvements seem to have been achieved through better accountability mechanisms facing officials, better curriculum support to schools, and a prioritisation of specific learning support materials".<sup>58</sup> If learning can improve as a result of mostly minor administrative improvements, then the potential of fundamental systemwide reforms should be abundantly clear.

CDE, 2023

Even in an inefficient bureaucracy, however, visionary and dedicated leaders at the local level can make a massive difference, allowing some districts or schools to operate as 'islands of effectiveness in a sea of dysfunction'. One shining example is of a local district director of education in the Eastern Cape, who, despite administrative difficulties with the bureaucracy, used existing regulations to remove incompetent principals and replace them with good leaders. This saw the district's matric pass rate rise from less than 30 percent in 2009 to more than 70 percent in 2013. (One school's matric pass rate jumped from 3 percent to 78 percent in that same timeframe; another's leapt from 16 percent to 90 percent).<sup>38</sup>

This story of a phenomenal turnaround shows what is possible when capable leaders are put in charge and educators feel accountable for their actions. This provides good reason to think that we need to give more powers to principals and education district directors, as long as it is in the context of merit-based appointments. It also fits with the evidence from the international literature that greater autonomy and greater accountability work together to create a high performing system. Giving greater autonomy and control to strong school leaders and other local officials helps instil a sense of responsibility for teachers' output and encourages localised initiatives to achieve better results through improved teacher performance.

By establishing a culture where school leaders are selected on merit and take responsibility for those they are tasked with supervising, a virtuous spiral of positive outcomes can ensue. As ex-Mayor of Chicago, Rahm Emanuel, a big supporter of this approach, explains, "Parents are rarely surprised when I note that even the best teachers can be rendered ineffective in a dysfunctional school, or that a great principal can turn a good teacher into an extraordinary educator."<sup>39</sup>

## Past interventions and initiatives: Not sustained or ambitious enough

There have been important initiatives to improve the way our education system functions. Some have had a positive impact, but none has gone far enough, or been sustained for long enough, to produce the kind of systemic changes we need.

One way that the education department tried to deliver better learning outcomes is through curriculum reform. In the late 1990s, it introduced outcomes-based education, which in the department's recent self-assessment, was "noble in its intent" but "became misaligned to the skills and needs of the country".<sup>40</sup> A new, more pragmatic initiative was launched in 2012, the Curriculum and Assessment Policy Statement (CAPS). This intervention "provides structure to subject content, details on classroom objectives, assessments tailored to grades and subjects" and, the DBE claims, "reduces teachers' administrative loads". However, the DBE has admitted that despite these curriculum reforms, "school performance has not reached expected levels".<sup>41</sup>

One of the DBE's boldest initiatives was introducing the Annual National Assessment (ANA), a universal standardised test, nationwide in 2011. The ANAs aimed at evaluating learner results across Grades 1-6 and Grade 9, and there is evidence that this contributed to some of the performance gains seen between 2011 and 2016 (as measured by international literacy and reading assessments). Professor Servaas van der Berg and Martin Gustafsson suggest that the ANAs raised accountability levels and caused teachers and others in the bureaucracy to find ways to improve their performance. Unfortunately, the ANAs were cancelled in 2015 (mainly due to SADTU pressure) and it seems the system reverted to type once that source of accountability was removed.<sup>42</sup> South Africa is now one of only three of 16 SADC countries that does not conduct universal standardised assessments at primary school level (Angola and the Democratic Republic of the Congo are the others). The Western Cape still conducts such evaluations in Grade 3, 6 and 9, but they only provide aggregated data at the school level. The results are rarely reported to teachers, learners or parents.

**"The DBE has admitted that despite these curriculum reforms, school performance has not reached expected levels"**

In 2011, the DBE also established NEEDU, whose mission is to provide the minister with an authoritative, accurate, analytical account on the state of schools, with particular emphasis on teaching and learning. The first evaluation cycle from 2012 to 2016 focused on curriculum delivery by tracking instructional leadership practices. Its 2013 report on Teaching and Learning in Rural Primary Schools was not released until 2015 after it pointed to corruption in the hiring of teachers, with a large role played by teacher unions. This received some attention beyond the education department but after its CEO Dr Nick Taylor resigned in 2015, NEEDU was reportedly shifted to a department within the DBE where it receives little attention, although its work continues. On top of that, the NEEDU Bill of 2012 guaranteeing its independence was shelved.<sup>43</sup>

Prior to that, the DBE attempted to impose a mandatory qualification programme for principals, known as the Advanced Certificate in Education (ACE). An independent review of ACE found that it had potential to improve school leadership and management practices if certain relevant adaptations were made. However, owing to 'undue influence' from SADTU, ACE was abandoned. Thus, the attempt to professionalise school leadership and introduce merit-based appointments was thwarted.<sup>44</sup>

Ultimately, efforts to reform the education system, while noble, have not been far-ranging or long-lasting enough to have made a meaningful difference to the delivery of quality education. Systemwide reform to improve learning outcomes must be seen through to its end by leaders if it is to succeed.

### **Teaching assistants: What role could they play?**

As part of the President's drive to expand employment in the wake of the Covid-19 pandemic, teacher assistants have been hired and placed in more than 22,000 public schools across the country as part of the Basic Education Employment Initiative (BEEI). Starting in December 2020, young people with a matric were hired to work for several months as either an education assistant (providing support to teachers) or a general assistant (support school maintenance and security). Phase 4 of the BEEI, comprising a target of 255,000 assistants, commenced on 1 February 2023, although only 29,000 are assisting with reading, the rest being 'handymen', 'e-cadres', curriculum assistants, care and support assistants, or helping with sports or arts. In total, around 840,000 assistants have been hired at a cost of R25.5 billion.<sup>59</sup>

Several commentators, including Dr Kate Philip, the programme lead on the Presidential Employment Stimulus (PES), have called for this initiative to be expanded and perhaps even made permanent. Philip believes that this could have massively positive consequences not only for youth employment, but learning outcomes, too. As evidence, she cites the fact that, in her words, 95 percent of teachers surveyed during Phase 1 of the BEEI "confirmed that it has strengthened the learning environment in schools".<sup>60</sup> Others point to the 2021-2022 Funda Wande pilot (assessing 120 no-fee schools in Limpopo) that showed the beneficial effects of teaching assistants, learner workbooks, teacher guides and graded readers on learning outcomes. The effect of the teacher assistants and learning materials are 129 percent of a year's worth of learning.<sup>61</sup>

It is worth cautioning that because Funda Wande selected teaching assistants through a careful and rigorous process and trained them similar impact is unlikely to be seen at scale. As yet there have been no evaluations of the BEEI's impact on learning. Thus, the expected impact of the BEEI on learning outcomes must be balanced against the enormous cost of employing teaching assistants before a decision is made to implement the BEEI on a permanent basis.

CDE, 2023

In recent years, the DBE has partnered with private entities to run, or at least endorse, large-scale private sector education programmes. One of the most important of these is the Early Grade Reading Study (EGRS) intervention. The EGRS provides lesson plans, reading materials and on-site coaching by reading experts to teachers in various settings, both rural and urban, across more than 1,000 schools. The early results of this initiative are mixed. After two years of the coaching intervention in 50 schools, learners were on average approximately 40 percent of a year of learning ahead of the learners in the control schools. In effect, this

is equivalent to being able to read five additional words per minute. The coaching intervention also seems to help boys catch up some of the way to girls. However, there has been minimal impact from interventions that exclude coaching by reading experts – the most expensive and time-consuming of the interventions– and the initiative seems to benefit the stronger students to a greater extent than the weaker ones.<sup>45</sup>

**“South Africa is now one of only three of 16 SADC countries that does not conduct universal standardised assessments at primary school level”**

These initiatives and other experimental interventions and pilots such as the Funda Wandu studies are commendable and deserve the support of the DBE, and some have had a measurable, though moderate, impact. However, education experts like Professor Nic Spaull and Dr Stephen Taylor doubt that progress with respect to reading improvements can be realised and sustained unless systemwide reforms emerge. Or, as education expert Professor Brahm Fleisch put it to CDE, experimental evidence “is a necessary but not sufficient condition” of improvement.<sup>46</sup>

This view is backed up by international evidence, which suggests that broad and sustained progress depends on whole system reform.<sup>47</sup> As Professor Lant Pritchett explains, the real challenge is “the hard, but pressing, question of how to shift education systems from their current mode to systems and organisations that promote the better and faster learning that children need to prepare for the complex and demanding future they will face”.<sup>48</sup> This is a crucial issue across the world, but in South Africa the need is particularly pressing.

We are not arguing that strengthening the system should happen at the expense of experimental interventions. Choosing between these two options is a false dichotomy. In fact, education pilots and experimental projects can, if independently monitored, evaluated and publicly reported, play a crucial guiding function in broader system reforms. What we need is, in the words of Dr Stephen Taylor, “fewer interventions that are neither at scale nor generating evidence to inform the system”.<sup>49</sup>

## **The DBE's 2020 Action Plan: One step forward, two steps back**

It is encouraging that the DBE has identified a need to reform the system. In its most recent Action Plan, published in August 2020, the DBE lays out what might be thought of as its 'reform vision' for the next few years, reflecting on what improvements have already been made, what needs to be achieved, how realistic this is and how further achievements are to be realised in the education system.<sup>50</sup> In CDE's analysis, the DBE's medium-term strategic vision is lacking key ingredients that could go some way towards addressing systemic shortcomings.

The 2020 Action Plan draws on several other important documents, including the NDP (2012), the MTSF (2020) and the DBE's annual performance plans. The Action Plan sets out six priorities, 27 goals and 36 indicators by which to measure those goals. Almost all its goals are from the previous iteration of the Action Plan in 2015. Although many important reforms are discussed and endorsed, these do not find their way into its list of goals, never mind its priority goals.

Most goals outlined in the plan relate to improving specific education outcomes, such as numeracy at Grade 3 level or NSC passes of a certain quality. Three of the five 'priority goals' concern the way the system is run: improve the professionalism, teaching skills, subject knowledge and computer literacy of teachers throughout



their entire careers; ensure that the basic annual management processes take place across all schools in the country in a way that contributes towards a functional school environment; and improve the frequency and quality of the monitoring and support services provided to schools by district offices, partly through better use of digital technology.

A major drawback of the plan is that there are no credible pathways articulated for how the priorities to be measured will be changed for the better. For instance, the Action Plan refers, positively in our view, to enhancing the powers of principals to control their schools, but the key responsibilities needed to advance school performance, such as appointing and managing teachers, are not included. As another example, the plan repeatedly stresses the importance of data and the role this can play in empowering parents to hold schools accountable, such as through the publication of school report cards, but no commitment is made to actually introduce these.

**“What we need is fewer interventions that are neither at scale nor generating evidence to inform the system”**

Also not discussed is the critical importance of holding teachers accountable for their performance. In the plan, the DBE admits that “it was not clear how information emerging from ANAs should, and should not, be used to hold various actors in the system accountable”.<sup>51</sup> The rational solution – that teachers or principals should be held responsible for the performance of learners under their tutelage or jurisdiction, with due consideration for socioeconomic conditions of schools and their student bodies – is not considered. The 2020 Medium-

Term Strategic Framework (MTSF) calls for the introduction of “a better accountability system for principals, which should be fair, based on appropriate data, and take into account the socio-economic context of schools”, but to date, no such system has been implemented.<sup>52</sup> Perhaps this is why the plan provides no commitment to reintroducing some version of the ANA, despite the fact that three-quarters of principals support a national examination in Grade 6, and two-thirds believe it should be used to compare schools.<sup>53</sup> The country's leading education experts all support the use of better designed universal standardised assessments.<sup>54</sup>

The DBE's Action Plan is, in CDE's view, too focused on tinkering with the system, while avoiding the need to fix the deep-seated causes of dysfunction. This is a key factor in explaining why the country's learning gains have decelerated and why we need an entirely new approach if we are to move forward with the speed required.

## **Conclusion: Tackling the underlying challenges**

It is important to acknowledge the large role that a child's socioeconomic background plays in determining learning outcomes. The tools and facilities at a teacher's disposal are also important. However, the extent and quality of teacher knowledge and pedagogical practices are of much greater importance in determining how well teachers do. Good teachers can, and do, find ways to get their lessons across even when facilities are less than ideal.

It is just as vital to understand the ways in which teachers are held to account, and how that structures their behaviour in the classroom. Teachers who feel unmotivated and able to get away with expending very low levels of effort are unlikely to be effective. Those who, furthermore, do not get the support and assistance they need to do their jobs will, again, deliver suboptimal results. The quality of the bureaucracy that provides support

to teachers and enforces accountability rules and mechanisms is therefore critical. Our current system has a glaring lack of bureaucratic capability, with only pockets of effectiveness as exceptions. This reality has profound consequences for how teachers perform.

If we are to make significant progress, we will have to undertake systemwide reform. Changing and improving a large system like ours will be a complex process, which may take time to show rewards (although it should be noted that "reform efforts can bring about significant improvement within a three to five-year period" if they are supported by strong leaders).<sup>55</sup> Getting reform going is unequivocally in the interests of all South Africans, including teachers and their unions.

Reformers often fail because the temptation is to avoid the tough choices and actions needed for wholesale change and thus do something – anything – even if it is an initiative that has little chance of making anything but a marginal impact in the long run. This is why we often see a focus on simply adding inputs into the existing system, from textbooks, tablets and teacher salary increases to more school buildings.

The critical question to ask is: should we see education reform in South Africa as a series of narrow, isolated, potentially useful interventions that produce marginal improvements in spite of a generally dysfunctional system – what delivery expert Sir Michael Barber calls 'patch and mend' – or do we tackle the underlying challenges, in an incremental but sustained way, in the belief that coordinated fundamental reform is essential to substantive improvement? CDE is strongly in favour of the second approach.

**“The country’s leading education experts all support the use of better designed universal standardised assessments”**

## Next report

In the third report in this series we revisit the revelations of pervasive corruption, and capture of large parts of the education bureaucracy by the country's dominant teacher union, SADTU. We show that nothing has been done to hold those involved in criminality responsible for their actions and that corruption in the education sector continues to fester. The 'endemic' practice of cadre deployment and widespread corruption have direct and hugely damaging consequences for teaching and learning.

## The Silent Crisis

- Report 1: Presents key facts about our uniquely underperforming education system, with a particular focus on our comparative learning failures and the scale of the challenge.
- Report 2: Identifies the root causes of system dysfunction and analyses why we need system reform.
- Report 3: Shows how corruption and cadre deployment by unions undermines the education bureaucracy's ability to deliver learning.
- Report 4: Explores the challenges and opportunities for reform by looking at recent case studies from Latin America and elsewhere.
- Report 5: Summarises CDE findings and set out our priorities for action.

## Endnotes

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- <sup>36</sup>The levels are ranked as follows: Level 1 – the department is non-compliant with legal/regulatory requirements; Level 2 – the department is partially compliant with legal/regulatory requirements; Level 3 – the department is fully compliant with legal/regulatory requirements; Levels 4 – the department is fully compliant with legal/regulatory requirements and is doing things smartly. In 2018/9, the DBE had 16 percent of its scores at Level 1 or 2. Department of Planning, Monitoring and Evaluation, The Management Performance Assessment Tool (MPAT) (date unknown), 2.
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