OPERATION PHAKISA DOCUMENTATION

Document	Date Published	Published by	Purpose
a) EDUCATION HUMAN RESOURCE MANAGEMENT			
Value in the classroom: the quantity and quality of South African teachers (Executive Summary)	**Sep 2011**	**Centre for Development and Enterprise (CDE)**	**The report examines the situation in the country surrounding teacher supply and demand. Its overall conclusion is that South Africa urgently needs more and better teachers.**
Methodologies used by Midwest Region states for studying teacher supply and demand	Sep 2009	Regional Educational Laboratory at Learning Point Associates Midwest	This report describes how state education agencies in the Midwest Region monitor teacher supply, demand, and shortage; details why they monitor these data; and offers estimates of the monetary costs incurred in performing such studies.
Proposal for the review of the incentives policy	**Aug 2014**	**DBE**	**The purpose of this paper is to provide a brief review the current policy on incentives for educators, implementation challenges, policy gaps; and to give broad proposals on the reviewed policy and norms.**
Review of the implementation of the teacher incentives policy	**May 2014**	**DBE**	
Preparation, recruitment, and retention of teachers	**2006**	International Academy of Education (IAE) International Institute for Educational Planning (IIEP)	The purpose of this monograph is to identify issues that summarize research findings and best practices related to the preparation, recruitment, and retention of quality teachers. It was designed to help policymakers make decisions about how best to prepare teachers, recruit outstanding candidates to teaching, and retain them in the teaching profession.
Post Distribution Model for the Allocation of Educator Posts to Schools	**2008**	**DBE**	**The model is based on the principle that available posts are distributed among schools, proportionally to their number of weighted learners.**

EDUCATION HUMAN RESOURCE MANAGEMENT

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Improvement in conditions of service for educators employed in terms of the employment of educators act, 1998: teacher incentives	Jan 2008	DBE	The purpose of these measures is to provide for the payment of incentives to academically qualified educators who qualify for incentives by meeting certain prescribed criteria.
Personnel Administration Measures (PAM) determined by the Minister of Education in terms of the Employment of Educators Act 1998 (the Act) and the Regulations made in terms of the Act (Regulations)	**1999**	**ELRC**	**This PAM is applicable to educators at schools, technical colleges, colleges of education and education control and auxiliary services that concern themselves with all those activities aimed at educating and teaching pupils/students, in respect of both formal and non-formal education.**
Strategy on recruitment and deployment of educators	2013	DBE	The overall aim of the strategy is to ensure stability in the system through employing effective and efficient practices in the recruitment and deployment of post level one educators.
Methodological guide for the Analysis of Teacher Issues	**Jan 2010**	**United Nations Educational, Scientific and Cultural Organization**	**This guide was developed within the framework of the Teacher Training Initiative for Sub-Saharan Africa (TTISSA) which was launched in 2006. TTISSA is one of UNESCO's three high-level initiatives in education. Confronted with the challenge of increasing the number of teachers and improving their level of competence, African Member States requested UNESCO to develop and implement an initiative focused on teachers. TTISSA is UNESCO's response to this request. Planned for a period of ten years, it aims to increase the quantity and improve the quality of the teaching force in sub-Saharan Africa.**
International approaches to teacher selection and recruitment	Aug 2009	Organisation for Economic Cooperation and Development (OECD)	This report presents the findings of our review of the evidence base on comparative practices of teacher selection and recruitment, specifically on the different mechanisms countries use to assess teacher readiness to take up teaching posts, with particular emphasis on testing or examinations. It is intended that the report will be helpful to countries or states that are looking to review their existing methods of recruiting and selecting teachers, and to those who are advising them.
Teacher Matter: Attracting, developing and retaining effective teachers	**Sep 2011**	**Organisation for Economic Cooperation and**	**Retaining effective teachers implies not only that all teachers have opportunities, support and incentives to continue to improve and perform at high levels, but also that ineffective teachers do not stay in the profession.**

EDUCATION HUMAN RESOURCE MANAGEMENT

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		Development (OECD)	
Placement of Funza Lushaka Graduates: 2009 – 2014	**Oct 2014**	**DBE**	This report summarises the placement reports covering placement of graduates from 2008 to 2013. Thus, graduates who completed in 2008 and eligible for placement in 2009, up to and including graduates who completed in 2013 for 2014 placement. This report therefore encompasses a 5 year reflection of placement of graduates trained through the Funza Lushaka graduates.
Effective Schools : Teacher Hiring, Assignment, Development, and Retention	**Jul 2012**	**MIT Press**	**The literature on effective schools emphasizes the importance of a quality teaching force in improving educational outcomes for students. In this article we use value added methods to examine the relationship between a school's effectiveness and the recruitment, assignment, development, and retention of its teachers. Our results reveal four key findings. First, we find that more effective schools are able to attract and hire more effective teachers from other schools when vacancies arise. Second, more effective schools assign novice teachers to students in a more equitable fashion. Third, teachers who work in schools that were more effective at raising achievement in a prior period improve more rapidly in a subsequent period than do those in less effective schools. Finally, we find that more effective schools are better able to retain higher-quality teachers. The results point to the importance of personnel and, perhaps, school personnel practices for improving student outcomes.**
Review of Education, Skills Development and Innovation	Nov 2011	Human Sciences Research Council (HSRC)	This article reviews current research to identify major constraints and blockages and to propose new ways forward in relation to three critical aspects of education, skills development and innovation.
Employment of Educators Act 76 of 1998	**Sep 1998**	**Government Printers**	**To provide for the employment of educators by the State, for the regulation of the conditions of service, discipline, retirement and discharge of educators and for matters connected therewith.**

EDUCATION HUMAN RESOURCE MANAGEMENT

Document	Date Published	Published by	Purpose
b) TEACHER CAPACITY AND SCHOOL LEADERSHIP MANAGEMENT			
Integrated Strategic Planning Framework for Teacher Education and Development in South Africa, 2011–2025 (Technical Report)	Apr 2011	DBE	This *Technical Report* brings together into one document all the research undertaken towards the development of the new, strengthened, integrated Plan for teacher development in South Africa.
Integrated Strategic Planning Framework for Teacher Education and Development in South Africa, 2011–2025 (Full Version)	**Apr 2011**	**DBE**	**The Plan presented in this document is an *Integrated Strategic Planning Framework for Teacher Education and Development in South Africa*, and as such should be understood as part of an ongoing, dynamic planning process, which will continue to rely on the input of all teacher education and development stakeholders, and through which the quality 0f teacher education and development will be improved over time. The primary outcome of the Plan is to improve the quality of teacher education and development in order to improve the quality of teachers and teaching.**
National Implementation of Post Provisioning: National Report	**Sep 2013**	Deloitte	This report is based on work done by Deloitte in response to the United Nations Children's Fund (UNICEF) Request for Proposals (RfP) for services: LRPS-CLE-2012910 2739-Design and implement a research (investigative)tool to review progress with the implementation of post provisioning norms and to assess the impact on educator provisioning, planning, utilisation and deployment in response to Action Plan to 2014: Towards the Realisation of Schooling 2025 on provincial level. The outcomes of the project is to design and implement an investigative tool to review progress with the implementation of Post Provisioning (PP) norms and to assess the impact on educator provisioning, planning and utilisation and deployment in response to Action Plan 2014: Towards the Realisation of Schooling 2025.
In-Service Training of Teachers (INSET) **INSET EPR Programme Elements** **INSET EPR Costing Model**	**Dec 2013**	**National Treasury and Cornerstone Economic Research**	**The Department of Basic Education (DBE) has developed and issued the *Integrated Strategic Planning Framework for Teacher Education and Development in South Africa* (referred to as the Plan). The primary intended outcome of the Plan is to improve the quality of teacher education and development, thereby improving the quality of teachers and teaching.**

TEACHER CAPACITY AND TEACHER CAPACITY AND SCHOOL LEADERSHIP AND MANAGEMENT

Document	Date Published	Published by	Purpose
c) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT)			
Audit Of e-Education Initiatives Or Interventions In The Past 10 Years, 2013/14	Mar 2014	DBE	Early in April 2013, the ICT inter-provincial meeting held on 18 April 2013 discussed the method of collecting data for the audit of ICT in education initiatives, which was conceptualised with the Provinces in 2012. The data collection tool was further refined in the second Quarter (2013) ICT inter-provincial meeting and finally the ICT Inter-Provincial working group held on the 9 and 10 October 2013 discussed, improved and approved the final template to be used for data collection. Subsequently, official correspondences from the Director General were sent to all Provincial Head of Departments (HODs) requesting them to conduct an e-education audit and also grant permission for the DBE's officials to conduct monitoring and support visits in their respective provinces, as part of data gathering exercise for the for the audit.
White Paper on e-Education	**Sep 2004**	**DBE**	**The White Paper on e-Education, published in 2004, guides the Department of Education's approach to e-education and the integration of information and communication technologies (ICT) into teaching and learning. Among other things, ICT is to be used to create greater access to learning opportunities, redress inequalities, improve the quality of teaching and learning, and provide personalised learning experiences.**
High-level summary of ICT in Education Initiative – Feasibility Study	2009	DBE	This document comprises the feasibility study conducted by KPMG in terms of Regulation 16, regulating public private partnerships (PPPs), promulgated in terms of section 76(4)(g) of the Public Finance Management Act, 1 of 1999 (PFMA). The purpose of the feasibility study was to determine whether the e-Education initiative was in the best interest of the Institution. The approach and methodology for the stages in the study (needs analysis, option analysis, due diligence, value assessment, economic valuation, and procurement plan) are described.
Guidelines for Teacher Training and Professional Development in ICT	**Nov 2007**	**Department of Education**	**All teachers will thus require the knowledge, skills, values and attitudes, as well as the necessary support, to integrate ICT into teaching and learning, and to support them in their various roles as mediators of learning, interpreters and designers of learning programmes, leaders, administrators, scholars, assessors and subject specialists. This document sets out the ICT knowledge, skills, values and attitudes needed by teachers to implement the National Curriculum Statement effectively.**

INFORMATION AND COMMUNICATION TECHNOLOGY (ICT)

Document	Date Published	Published by	Purpose
Managing ICTs in South African Schools: A guide for School Principals	2005	South African Institute for Distance Education (SAIDE)	The purpose of this guide is to give principals and senior school management information on using and managing ICT resources so that they can provide leadership in their schools. The guide also considers some implications of the use of the computer and related resources for teaching and learning. The authors hope that it will also be a valuable resource for other senior members of the school staff, and for School Governing Bodies.
Guidelines for Schools: ICT Hardware Specifications	**Aug 2012**	**DBE**	**The information in this document will assist the Department of Basic Education and Provincial Education Departments to achieve the goals set out in the White Paper on e-Education regarding ICT norms and standards. It should also be used by schools themselves who have access to funds to purchase ICT equipment.**

INFORMATION AND COMMUNICATION TECHNOLOGY (ICT)

Document	Date Published	Published by	Purpose
d) CURRICULUM			
Draft Policy on Screening, Identification, Assessment and Support	**2014**	**DBE**	**The purpose of the Policy on Screening, Identification, Assessment and Support (SIAS) is to provide a policy framework for the standardisation of the procedures to identify, assess and provide programmes for all learners who require additional support to enhance their participation and inclusion in school.**
Approval to call for written submissions from Stakeholder Bodies and Members of the public on the Draft Policy on SIAS	**Apr 2014**		
Education White Paper 6: Special Needs Education Building an inclusive education and training system	Jul 2001	Department of Education	In this White Paper we outline what an inclusive education and training system is, and how we intend to build it. It provides the framework for establishing such an education and training system, details a funding strategy, and lists the key steps to be taken in establishing an inclusive education and training system for South Africa.
Education White Paper 5 on Early Childhood Education. Meeting The Challenge Of Early Childhood Development In South Africa.	**May 2001**	**Department of Education**	**In this White Paper we outline how we will achieve this through a phased, poverty-targeted approach that makes use of grants-in-aid to primary schools and subsidies to selected community-based ECD sites within conditional grants and provincial budgets.**
Education White Paper 4: A Programme for the Transformation of Further Education and Training	**Sep 1998**	**Ministry of Education**	**In the White Paper on Education and Training, March 1995, the Ministry of Education took the view that Further Education and Training (FET) lies at the heart of the integration of our education and training system. In it, the Ministry expressed the desire for FET to be planned and co-ordinated as a comprehensive, interlocking sector that provides meaningful educational experiences to learners at the post compulsory phase.**
Language Development Framework for the GET and FET	2014	DBE	The Department of Basic Education is developing a Language Framework which seeks to strengthen the utility of languages and proficiency through the following: i. Language across the curriculum framework (LAC) Grade R-12; ii. Incremental introduction of African languages (IIAL); iii. English First Additional Language (EFAL) Grade 1-3; and iv. Sign Language.

CURRICULUM

Document	Date Published	Published by	Purpose
Education White Paper 1 on Education and Training	**Mar 1995**	**Department of Education**	**This document is a "white paper" which describes the first steps in policy formation by the Ministry of Education in the Government of National Unity. It** • **locates education and training within the national Reconstruction and Development Programme, and outlines the new priorities, values and principles for the education and training system** • **previews important developmental initiatives on which the Ministry of Education is engaged** • **discusses the implications of the new Constitution for the education system, especially in respect to Fundamental Rights** • **discusses the division of functions between national and provincial governments in the field of education and training** • **provides information about how the national and provincial departments of education are being established** • **analyses the budget process in education, and the necessity for a strategic approach to education funding in relation to the national priority for human resource development** • **discusses in detail two significant policy initiatives for the school system: the organisation, governance and funding of schools, and the approach to the provision of free and compulsory general education.**
2015 National Strategy for Learner Attainment (NSLA) Framework	Nov 2014	DBE	The objectives of the framework are: i. Sustained improvement in learner outcomes or performance; ii. Enhanced accountability at all levels of the system; iii. Greater focus on basic functionality of schools; iv. Protecting time for teaching and learning; v. Improved support for teaching and learning; vi. Increased efforts on time on task; and vii. Resource provisioning
National Curriculum Framework Birth to Four (NCF)	**Sep 2012**	**DBE**	**The National Curriculum Framework (NCF) for children from before birth to the age of four is focused on the care, developmental and learning needs of babies, toddlers and young children.**

CURRICULUM

Document	Date Published	Published by	Purpose
The National Policy for an Equitable Provision of an enabling school physical teaching and learning environment	**May 2010**	**DBE**	**The goal of this policy then, is to guide the provision of an enabling physical teaching and learning environments that are sustainable, equitable for all learners in South Africa and to ensure that future investments are aligned with that definition. This policy framework for school infrastructure is critical to provide a basis for planning and implementation. It also responds to persisting challenges in the provision of an enabling physical teaching and learning environment. It builds on successes of the past decade and endeavours to address persisting gaps. It takes the future development to the next level that should enable South Africa to equitable and efficiently provide high quality learning environments, culturally sensitive values and development-related education, training and skills development experiences for *all* its learners. The policy seeks to transform the environment into an enabler for effective implementation of sector policies, effective curricula delivery, and effective teaching and learning processes.**
Facilities Maintenance Guidelines For Public Schools	Jul 2012	DBE	The objectives of the infrastructure programme are to contribute to Presidential Outcome 1: Improved quality of basic education, and the Schooling 2025 objective. The aim is that by 2025 schools and their teaching and learning environments will be at new and relevant international best practice levels of provision and functionality. The school environment should be in an acceptable condition to attract and retain good teachers, and to create a conducive learning environment for learners. The strengths of the maintenance strategy are that it's a legislated process, and systems and processes are in place. Every community has some maintenance capacity and only awareness and management is lacking. The challenge for the Department of Basic Education is to raise awareness of the strategy, systems and processes, so that every school can be adequately maintained.

Regulations relating to the minimum uniform norms and standards for public school infrastructre	**Nov 2013**	**DBE**	**The objectives of the regulations are-**
			  i. **to provide minimum uniform norms and standards for public school infrastructure;**
			  ii. **to ensure that there is compliance with the minimum uniform norms and standards in the design and construction of new schools and additions, alterations and improvements to schools which exist when these regulations are published; and**
			  iii. **to provide for timeframes within which school infrastructure backlogs must be eradicated.**

INFRASTRUCTURE

Document	Date Published	Published by	Purpose
Medium Term Strategic Framework, 2014-2019	2014	Presidency	This Medium Term Strategic Framework (MTSF) is Government's strategic plan for the 2014-2019 electoral term. It reflects the commitments made in the election manifesto of the governing party, including the commitment to implement the NDP. The MTSF sets out the actions Government will take and targets to be achieved. It also provides a framework for the other plans of national, provincial and local government.
Outcome 1: Quality Basic Education			The quality of the South African education system depends on the expertise (understanding of the curriculum, content knowledge and teaching skills) and commitment of its teachers. The NDP identifies a four-pronged strategy to ensure an adequate number of dedicated, skilled teachers: (1) Produce, through the university and other systems, more and better qualified teachers, (2) Develop in-service training strategies and support systems that will continually develop the skills of teachers (3) Cooperate with professional bodies and teacher unions to enhance member expertise and commitment (4) Ensure an appropriate pay structure which also rewards good teachers. The MTSF translates the thrust of the NDP into activities and targets to improve and monitor the supply of new teachers to the education system, to increase the quantity and quality of teacher development activities and activities to improve the utilization and motivation of teachers. In a number of cases the strategies to ensure the reaching of targets are not fully developed and this presents significant challenges to the sector. In some cases adequate data are not generally available to track and evaluate activities. In addition to strategy development the sector will also have to improve information sources (currently there is significant reliance on the, School Monitoring Survey, last undertaken in 2011 and planned again for 2014). As part of the strengthening of the accountability system (Output 5) the review of the total post provisioning structure and approach, including aspects of remuneration, is also planned.
National Development Plan 2030 (Executive Summary) **NDP: Chapter 9: Improving education, training and innovation**	**Nov 2011**	**Presidency, National Planning Commission**	**The National Development Plan aims to eliminate poverty and reduce inequality by 2030. The plan discusses the national plans for each sector respectively for national development including education.** **This chapter focuses on sub-sectors of the education, training and innovation system:** • **Early childhood development** • **Basic education** • **Post-school** • **The national research and innovation system.** **GENERAL**

Document	Date Published	Published by	Purpose
Action Plan to 2014 (Full)	Oct 2011	DBE	*This Action Plan to 2014: Towards the Realisation of Schooling 2025* is the sector plan for basic education. It is based on 27 national goals that are intended to improve basic education across all levels. Thirteen of these goals are output goals dealing with better school results and better enrolment of learners in schools. The remaining 14 goals deal with things that must happen for the output goals to be realised. The full version of the Action Plan is primarily aimed at managers in the schooling system and at those involved in monitoring progress in the sector. The list of intended users of the plan thus includes officials from the national Department of Basic Education and from the nine provincial education departments (including district officials); managers and researchers in key parastatals and statutory bodies, such as Umalusi, the ELRC and SACE; people in local and international NGOs and development agencies involved in improving South Africa's schools; and researchers at universities and other research organisations. Crucially, the intention is for all of South Africa's more than 25 000 school principals to be familiar with the contents of this plan.
Action Plan to 2014 (Summary)	**Oct 2011**	**DBE**	**The summary of the *Action Plan to 2014: Towards the Realisation of Schooling 2025* is intended for dissemination to a wide range of stakeholders, including educators working in the more than 25 000 public schools in the country, parents and the public in general. In addition, even shorter brochures, in all 11 official languages, explaining the key elements of the Action Plan, have been produced and distributed.**
Draft Action Plan to 2019	June 2014	DBE	This plan, produced by the Department of Basic Education (DBE), represents another milestone in the journey towards quality schooling for all South Africans. This document takes stock of key developments in the basic education sector since the release in 2011 of the last sector plan, *Action Plan to 2014: Towards the realisation of Schooling 2025*. It reiterates many of the priorities outlined in the earlier plan, as to a large extent priorities have remained the same in recent years. However, there are also shifts of emphasis in the wake of lessons learnt and, very importantly, priorities put forward by the National Development Plan (NDP) released by the President in 2012. In line with the NDP, the planning horizon in the current plan is 2030, and no longer 2025. The medium term horizon is set at 2019, which is the end of the 2014 to 2019 electoral cycle.

GENERAL