



# JOINT EDUCATION TRUST

*Annual Review 2001*



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*JET Head Office Staff, 2001*

## MISSION AND STRATEGY

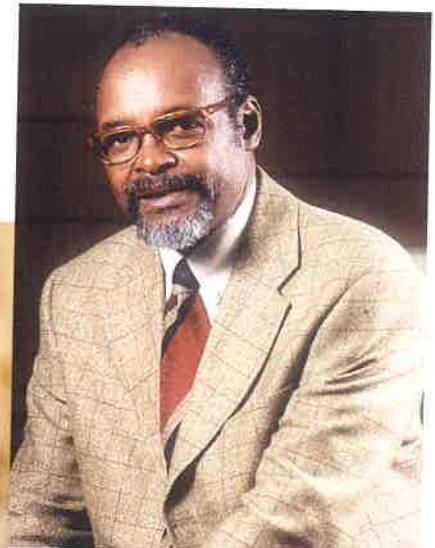
- To serve the development of the most disadvantaged groups in South African society.
- To mobilise and co-ordinate resources between the public, private and civil sectors.
- To improve the quality of education and the relationship between education and the world of work.
- To contribute to the process of long-term fundamental change in the education and training system.
- To show measurable results.

## SERVICES

- Project Management
- Financial Management and Fund-holding
- Evaluation
- Research
- Workforce Advising



*Margie Keeton, Tshikululu Social Investments, Board Member, Joint Education Trust, 1997 to 2001  
Director, JET Education Services, 2001 to present*



*Chabani Manganyi, Executive Director, Joint Education Trust, 1992 to 1993*



*Thandiwe January-McLean, JET Education Services, Chair, 2001 to present*

## SECTORS

- School Reform
- Teacher Development
- Higher Education
- Further Education and Training
- Worker and Adult Education

## JET PARTNERS

- AECI Limited
- Amplats Limited
- Anglo American Corporation Limited
- AngloGold Limited
- Barloworld Limited
- Billiton SA Limited
- CG Smith Limited
- De Beers Consolidated Mines Limited
- First National Bank of SA Limited
- Johannesburg Consolidated Investment Company Limited
- Johnnie Limited
- Reunert Limited
- Sanlam
- Sasol Limited
- Southern Life Association Limited
- Standard Bank Investment Corporation
- The South African Breweries Limited
- The African National Congress
- The Azanian Peoples Organisation
- The Congress of South African Trade Unions
- The Foundation for African Business and Consumer Services
- The Inkatha Freedom Party
- The National African Federated Chamber of Commerce
- The National Council of Trade Unions
- The Pan African Congress
- The South African Democratic Teachers Union



Aubrey Matlole, SADTU, Board member, Joint Education Trust, 1995 to 2001

## BOARD OF TRUSTEES

- |                                      |                        |
|--------------------------------------|------------------------|
| Mike Rosholt<br><i>(Chairman)</i>    | Sej Motau              |
| Naledi Pandor<br><i>(Vice Chair)</i> | David Moshapalo        |
| Naele Axelson                        | Mogole Mphahlele       |
| Mahlengi Bengu                       | Thenjiwe Ntintso       |
| Margie Keeton                        | Andrea Parkerson       |
| Andre Lamprecht                      | Jeremy Raetliffe       |
| Peter Mahlangu                       | Sam Seepei             |
| Jabu Maphalala                       | Leepile Taunyane       |
| Aubrey Matlole                       | Motlhalegi Thale       |
|                                      | Nolitha Vulkuzza-Linda |



Cheryl Carolus, ANC, Board member, Joint Education Trust, 1992 to 1997



Michael O'Dowd, Anglo American Corporation, Board member, Joint Education Trust, 1992 to 1996

- |   |   |   |
|---|---|---|
| Dr Nick Taylor<br><i>(Executive Director)</i>                                     | Tonya Alexander<br><i>(Accounts Clerk)</i>              | Buyi Diba<br><i>(Records Clerk)</i>               |
| Anthony Gewer<br><i>(Divisional Manager: Research &amp; Evaluation)</i>           | Hawa Hoosen<br><i>(HR/Office Manager)</i>               | Thabiso Nyabanyaba<br><i>(Project Manager)</i>    |
| Dasi Moodley<br><i>(Divisional Manager: Workforce Development)</i>                | Leigh-Mae Moses<br><i>(Project Officer)</i>             | Maureen Otto<br><i>(Accounts Supervisor)</i>      |
| Alan Ralphs<br><i>(Divisional Manager: Lifelong Learning)</i>                     | Thuli Nkosi<br><i>(Administrator)</i>                   | Jennifer Roberts<br><i>(Project Manager)</i>      |
| Kholofelo Sedibe<br><i>(Divisional Manager: School Development &amp; Support)</i> | Sindi Nyoka<br><i>(Project Manager)</i>                 | Phindi Sigodi<br><i>(Project Manager)</i>         |
| Hemant Waghmarae<br><i>(Divisional Manager: QLP)</i>                              | Tebogo Kibe<br><i>(Accounts Clerk)</i>                  | Jabu Simelane<br><i>(Administrator)</i>           |
| Jim Wotherspoon<br><i>(Divisional Manager: Finance &amp; Administration)</i>      | Robyn Klein<br><i>(Administrator)</i>                   | Amarlal Soma<br><i>(Accountant)</i>               |
| Michelle Buchler<br><i>(Project Manager)</i>                                      | Elizabeth Koaho<br><i>(Accounts Clerk)</i>              | Kathy Tracey<br><i>(Public Relations Manager)</i> |
| Anele Davids<br><i>(QLP National Coordinator)</i>                                 | Patrick Madima<br><i>(Accounts Supervisor)</i>          |   |
| Thelma Dibakwane<br><i>(Administrator)</i>  | Gloria Mkhize<br><i>(Administrator)</i>                 | <b>RESIGNED</b>                                   |
|   | Debra Mogorosi<br><i>(Receptionist)</i>                 | <b>DURING THE YEAR</b>                            |
|   | Jackie Moyana<br><i>(National Informations Manager)</i> | Rhona Hing<br><i>(Accountant: Projects)</i>       |
|   |   | Thobile Ngubo<br><i>(Accounts Supervisor)</i>     |

## CHAIRMAN'S STATEMENT

2001 has seen the successful completion of the penultimate stage in JET's carefully managed transition from a grant-making Trust to a non-profit service company. The new company, JET Education Services, was publicly launched on 15 November 2001. It was most appropriate that Cheryl Carolus, who played a central role in the establishment of JET in the early 90s, acted as guest speaker at this important function.

It is also very pleasing to note that the organisation has once again produced a strong set of financial results - as in the financial report - which clearly reflects sound market positioning and client satisfaction with the services delivered by JET. The Trust has agreed to fund R16 million to the new organisation, which will allow it to start its life on a very solid financial footing.

The only remaining step in JET's transition is the winding up of the Trust, and transfer of the assets to JET Education Services. This will be done once the legislation on Public Benefit Organisations (PBOs) has been finalised and JET Education Services registered as a PBO. We hope to complete this process by the end of 2002.

Despite these changes in JET's legal status, the work of the organisation remains focused on the Mission which has guided its activities since its inception in January 1992. Although the last decade has been witness to perhaps the most momentous social and political changes in the history of South Africa, the development needs of the country remain unchanged. JET's track record indicates that it has played an important role in addressing these, and we look forward to the challenges of the next decade.



**AM ROSHOLT**  
**CHAIRMAN**



*Mike Rosholt, Chairman, Joint Education Trust, 1993 to 2002*

## VICE CHAIR'S STATEMENT



*Naledi Pandor, ViceChair, Joint Education Trust, 1996 to 2002*

A vibrant civil society is an essential ingredient of a healthy democracy. As the largest South African development agency in the field of education, JET continues to be an important player in the civil sector. It performs this role through three functions:

- As a funding conduit and project manager for donor funding, both from the South African corporate sector and the international donor community.
- As a supplier of services to government and the private sector.
- As a contributor to debates on appropriate policies, and effective delivery models. JET's excellent research capacity makes a key contribution in this regard.

JET has weathered the transition to democracy better than most Non-governmental organisations (NGOs). Aside from its service delivery track record, good governance has been an important element in this success. This principle has been carried into the Board of Directors of JET Education Services, the composition of which continues to reflect the diversity of South African society.

*Naledi Pandor*

**NALEDI PANDOR  
VICE CHAIR**

(Chairperson: National Council of Provinces)





Mike Spicer, Anglo American Corporation, who was one of the guest speakers at the launch ceremony

.....it is apparent that the activities of JET have secured it a prominent niche in the field of education development in South Africa and that this expertise has provided a strong foundation on which JET can build its future work.

Thandiwe January-McLean,  
Chair, JET Education  
Services



Thandiwe January-McLean, Chair, JET Education Services

*I am particularly pleased that the legacy of the Joint Education Trust will be carried forward in the form of the JET Education Services. I know I speak on behalf of all my colleagues at Anglo American, as well as all the other business funders of JET, when I wish JET Education Services every success in the future.*

Mike Spicer  
Anglo American Corporation



Thobile Ngubo and Hawa Hoosen, JET with Diana Bamford-Rees, CAEL

### THE MISSION FOR JET EDUCATION SERVICES AND JET EDUCATION MANAGEMENT

- To serve the development of the most disadvantaged groups in South African society.
- To mobilise and coordinate resources between the public, private and civil sectors.
- To improve the quality of education and the relationship between education and the world of work.
- To contribute to the process of long-term fundamental change in the education and training system.
- To show measurable results.



its history - the fulfilment of the brief for which the Trust was founded -  
However, it had become apparent that the other activities of JET had  
on development JET's invaluable hands-on experience is unique in South  
crises and Jet Education Management to take over this work

formation of these non-profit companies  
in order to serve JET as well over the past nine years.  
is the convergence of perspectives, expertise and representative principles

ctors of these companies. Other Non-Executive Directors are: Mike Rodolph,  
Sindi Zilwa, Yvonne Ballum, Jeremy Riedel and Brian Kgati. The JET



Kholofelo Sedibe, (centre) with Morongwa Makakane, Office of the Auditor-General South Africa, (left) and Malebo Mothibe, Gillette Group SA (Pty) Limited



# SCHOOL DEVELOPMENT AND SUPPORT

*Kholofelo Sedibe*

In 2001, JET continued to work closely with the national and provincial departments of education, local and international donor agencies, NGOs and other stakeholders in an effort to implement government policy and to improve the quality of schooling at all levels of the system.

## Mahlahle

Currently in its third year of implementation, Mahlalahle is a four-year district and school development project of the Limpopo Province Department of Education, in partnership with JET. To date the JET Board has contributed R18,8 million towards the implementation of the project and the DG Murray Trust has contributed R300 000. Mahlalahle works with 50 primary and 36 secondary schools in the Giyani and Phalaborwa districts.

The PROMAT Consortium continued to support school governing bodies (SGBs) and school management teams (SMTs) in the setting up and maintenance of management, governance and administration systems. Information on all schools in the region has been captured and will be updated annually.

In addition, curriculum support for grades 4 and 7 was provided by a consortium of service providers led by PROTEC. This work is aimed at improving content subject knowledge in maths, science and language, and the selection and use of learning support materials (LSMs). A second consortium was appointed in July to provide curriculum support to grade 8 and 9 educators in the three learning areas.

A baseline study was conducted in grade 8 and 9 and Tsimeni Consulting and Ntshingila-Khosa & Associates were appointed as the external evaluators for the project.

Below is a brief summary of the grade 8 to 9 baseline findings:

- The performance of the learners in both mathematics and English is between two and three years behind expected levels of performance when compared with the defined curriculum outcomes.
- Teachers are generally well qualified and have adequate content knowledge. However, facilities and systems and procedures for effective curriculum implementation need improving.
- Although Outcomes Based Education (OBE) terminology such as 'continuous assessment' pervades schools and classrooms, closer investigation revealed heavy reliance on traditional (monthly/bi-monthly tests) and broad practices, with ineffective reports to parents on learner progress.
- The ordering, storing and recording of learning support material in most schools is unsystematic. Available books are often under-utilised and described as 'old'. In addition, schools reported that they do not have efficient mechanisms for ensuring the return of LSM by learners.



*Left to right*  
*Kholofelo Sedibe, Divisional Manager; Jabu Simelane, Administrator and Sindli Nyoka, Project Manager*

## **Co-operation in Education between the Netherlands and South Africa (CENESA)**

The purpose of the CENESA programme is to strengthen the development of human and organisational capacity, and contribute towards the construction of approaches, systems and methodologies related to the realisation of South African national education policies. In addition, the project seeks to build longer-term relationships between Dutch and South African education institutions, creating opportunities for mutual learning between the two countries and improving the effectiveness of current Dutch development co-operation in the context of the sector-wide approach.

CENESA is a five-year project which started in 2000, with an annual budget of approximately R5 million. In addition, the Netherlands Ministry has allocated R1,5 million for Further Education and Training (FET) support in 2001. The project is managed jointly by JET and NUFFIC, a Dutch NGO.

During 2001 four projects were approved and implemented under this programme:

### ***CINOP FET-RPL (Recognition of Prior Learning)***

The colleges that will participate in the RPL project have been selected and all the structures for the process have been set up. Project managers from the colleges and provincial personnel participated in a study visit to the Netherlands.

### ***SLO/CITO-GET (General Education and Training) OBE***

This project aims at contributing to the improvement of the quality of general education and training through capacity-building related to the introduction of OBE in curriculum development and assessment. Workshops conducted in 2001 resulted in participants being able to set up formats and formal structures that help the establishment of a school development plan, illustrative learning programmes, and assessment.

### ***Projects in the FET sector***

Fact finding missions were undertaken by Sector Education and Training Authorities (SETA), South African Qualifications Authority (SAQA) and the South African Certification Council to the Netherlands to share experiences and mutual learning with the Association of National Bodies (COLO). There was also a senior management training programme to the Netherlands for six weeks to contribute towards the implementation of the national landscape plan in FET colleges.

#### **Ad hoc visits**

These are visits for conference participation, fact-finding missions and consultancies. During this period, two such visits were carried out:

#### ***Fact-finding mission for Kwazulu-Natal provincial delegation***

Kwazulu-Natal has prioritised the training of staff throughout the province in order to improve the performance of the education structures and institutions. The province intends to achieve this objective by developing the capacity of people involved in governance and management. The visit was to identify a service provider to help set up a training programme for education management training in the province.

#### ***Fact-finding mission for North-West delegation***

In December 2001, a delegation from the North-West Province visited the Netherlands in order to learn about effective ways of improving teacher practice and learner performance and to identify a Dutch institution that will assist them in setting up a mathematics, science and technology unit/academy within the province. The purpose of the academy is to co-ordinate and deliver services that will result in enhanced learner performance in the fields of mathematics, science and technology.

## **Imbewu**

Imbewu was funded by the British Department for International Development (DFID) in the extent of £7,5 million, and managed by a joint venture led by JET. The project provided support to four levels of the Eastern Cape Department of Education: provincial, district, school and classroom, working directly with 523 primary schools in 22 districts. Although the project completed its full term in October 2000, the depreciating value of the rand resulted in substantial savings, which led to the extension of the project until July 2001.

The project was widely regarded as one of the most successful of its kind, leading to a further commitment of £22 million over five years by DFID. The tender for phase II was awarded to a consortium which includes Arcadis, a Dutch NGO, and the University of Pretoria.

## **District Development and Support Programme**

The District Development and Support Programme (DDSP), which began in 1998, is in its final year of implementation. The DDSP is funded by USAID and works in 459 primary schools in four provinces: Eastern Cape, KwaZulu-Natal, Limpopo Province and Northern Cape. JET is a subcontractor to the project manager, Research Triangle International. JET's responsibilities include the provision of two grants managers to the project office for the administration of the grants to service providers, management advice, research and technical support.

## **Siyathuthuka**

Siyathuthuka is a school development project of the KwaZulu-Natal Department of Education and Culture, in partnership with the Royal Netherlands Embassy, which funds the budget of R8,3 million. It is implemented in the Vryheid Region by the KwaZulu-Natal Department of Education with the support of several NGOs. The project provides support in management and governance at school and district levels, and curriculum support in mathematics, science and language at the intermediate phase.

In 2001, the project worked with 75 primary schools spread across four districts and 15 circuits in the Vryheid region. In addition, the project commissioned the Education Research and Development Division of JET to conduct a baseline study in May 2001. The results of the baseline were used to strengthen implementation and will, together with the findings of the external project review and gender audit reports, inform the design of phase II in 2002.

## **Learners with Special Educational Needs (LSEN)**

The project is funded by DANIDA in the extent of R13 million and is piloted in three provinces: Eastern Cape, North-West and Kwazulu-Natal. In 2001, provincial project structures, which include education, welfare, police services, disabled people's organisations and other stakeholder representatives, were formed. Contracted consortia conducted situational analyses in each of the three provinces and developed training modules for, and trained educators from, the participating schools. The first set of modules was revised and draft second modules were developed.

Project progress was reported to all nine provinces, the national Department of Education (DoE) and the members of the Southern African Development Community (SADC) Technical Committee on Inclusive Education in September 2001. In addition, a group of education and research experts in the area of inclusive education was appointed for quality assurance purposes.

The final progress report and all modules will be presented to the stakeholders at the second conference in 2002.

## **Grant-making**

In 2001, only R9 645 219 million was disbursed. This brings the total amount disbursed in this sector to almost R114 380 983 million since 1992.

# QUALITY LEARNING PROJECT

*Hemant Waghmarae*

## Scope of the Programme

The Quality Learning Project (QLP) is a partnership between the Business Trust, and the DoE. JET has been contracted to manage the project over a five-year period starting in January 2000. The purpose is to implement educational change in South Africa by working with district officials, school governing bodies, school management teams, and teachers, in order to improve the mathematics, reading and writing abilities of high school learners in over 500 schools. The five-year budget of R139 million is funded by the Business Trust.

## Headline Targets

- Increase the average performance in mathematics, English 2nd language, and overall matric pass rate by 10% in over 500 high schools over five years.
- Improved learning outcomes and assessment practices in mathematics and in English 2nd language in grades 8 to 12.
- Improved teaching of mathematics and of English (or specified language of instruction) in grades 8 to 12.
- Improved management, governance and administration.
- Improved management and administration in 17 district offices.
- Improved support to schools by 17 district offices, prioritising human resources and financial management, EMIS, textbook procurement and distribution, curriculum management and assessment.



*Left to right: Thelma Dibakwane, Jackie Mayana, Anele Davids, who took over as Divisional Manager from Hemant Waghmarae in December and Leigh-Mae Moses*

## The QLP Model

The QLP is a theory-driven intervention. The QLP is underpinned and informed by a systemic model of schooling that can be formulated as follows:

IF the demands to perform better on schools and educators are increased  
AND we enable the district to provide high quality monitoring of and support to the schools

AND we train the school (SGBs/SMTs, etc) to manage their schools more effectively AND we train the educators to teach mathematics and languages better, THEN we should get improved  
TEACHING QUALITY IN THE CLASSROOMS  
which WILL LEAD TO IMPROVED LEARNER PERFORMANCE.



*Thandi January-McLean (centre) Chair, JET Education Services with Minister Kader Asmal, Nomfundo Mqadi from the Business Trust and Anele Davids from JET hand over a cheque to Mr Lamola of Zebediela District, for the most improved QLP district*

The theory is built on two pillars: increasing the demands placed on the system as a whole (from the district to the learner) AND improving training and support to the system at all levels.

This project involves the delivery of services and programmes by a consortium of service providers to at least 350 000 learners, 12 000 teachers, 1 500 members of SMTs, 1 500 members of SGBs, and 500 secondary school principals in 17 districts in nine provinces. The management framework establishes clear reporting and accountability lines and gives all stakeholders a clear understanding of the organisation and management responsibilities.

The project is implementing an integrated capacity-building and systems development intervention directed at achieving the key outcomes. This intervention consists of five programmes:

### ***Programme 1: District development***

This involves organisational development, management training, and the establishment of systems for the management of human resources, finances, information, textbooks and other school supplies. The QLP therefore focuses on enabling the districts to provide administrative support to schools for the effective management of the curriculum.

### ***Programme 2: School development***

This programme includes organisational and systems development, and management and governance training for SGBs, principals and SMTs.

### ***Programme 3 : Learning outcomes and assessment practice***

This programme will consist of two components. First, the periodic assessment of learner achievement in English literacy and mathematics at grade 9 and 11 levels, and the provision of diagnostic tests in English and maths for classroom use in grades 8 to 12. Second, teachers are being trained to formulate learning outcomes and develop tests which guide and monitor teaching and learning in reading, writing and mathematics.

### ***Programme 4: Teacher development***

This programme includes a component for teachers of mathematics, and a language across the curriculum component for teachers of other subjects. The language across the curriculum approach enables teachers to acquire skills in interactive approaches to reading, developing writing ability, managing curriculum change, and using textbooks as a resource in content areas, and it supports them in implementing these approaches in their classrooms. Key teachers are also given skills in alternative approaches in the assessment of reading and writing.

The teachers of mathematics are supported through training in content knowledge, classroom management and methodology, assessment practice and the use of LSMs.

Key teachers are trained as trainers to impart their skills to other teachers in the school during school-based in-service training.

### ***Programme 5: Monitoring and evaluation***

This programme constitutes a three phase longitudinal evaluation: Baseline (2000), Mid-term Study (2002), and Final Evaluation (2004). Each phase consists of:

- The assessment of learner performance in maths and English at grades 9 and 11 in a sample of QLP schools.
- A description of management systems and practices in all 17 districts offices.
- A description of teaching practices in a sample of QLP schools.

The results of the baseline have informed the design of programmes 1, 2, 3 and 4.

The results of the Mid-term Study will be used to monitor the progress of the QLP against its targets, and to inform the design and delivery of the programmes.

The results of the Final Evaluation will provide a summative assessment of the QLP model.

## **Achievements**

During 2001 the QLP exceeded targets and spent 93% of its budget. More focus will be given in 2002 to the quality assurance of the service delivery and the close monitoring of this delivery by our QLP co-ordinators. QLP has also installed a relational database of project schools and this will enable the QLP to extract relevant information for analysis. QLP has appointed a National Information Manager who will analyse all the information from the co-ordinators' reports and the service providers' reports and provide strategic advice on the deliverables.

# RESEARCH AND EVALUATION

*Anthony Gewer*

**D**uring 2001, the Research and Evaluation Division continued its drive to provide good quality, empirically-based research and thereby to contribute to ongoing debates around educational change. With 40% of the national budget being allocated to education and around 10% of the nation's schools involved in donor-supported development projects, totalling around R1 billion per annum, the need for rigour in judging the impact of such programmes is critical. To date, this evidence is lacking, and we continue to strive to uncover the factors that promote or inhibit sustainable change. In addition, the onset of the Skills Development Strategy provides the opportunity for extensive research and evaluation across a variety of sectors to both inform and measure the nature of education and training provision.

## RESEARCHING SCHOOLS

The division has placed significant emphasis in 2001 on enhancing understanding of school reform in South Africa. As the division strives to refine its evaluation craft, the goal is to contribute to the ongoing debates on the policy and theory of school development. In maintaining a consistent approach to evaluation studies, the division has collected large sets of data which are now beginning to provide informed insight into the factors that impact on school development. As of the end of 2001, the division has collected data in 933 schools across South Africa over a two-year period, comprising a combination of learner performance, classroom and management data, and data related to the functioning of district offices. These data are being collated and analysed, the results of which consolidated into a publication due for release in the second half of 2002.



*Left to right: Carla Pereira, Jennifer Roberts, Ruth Magoro, Anthony Gewer, Thabiso Nyabanyaba and Thuli Nkosi*

The following projects have contributed towards this initiative.

### School Development Models

Through 12 case studies of school development projects, the study provided a map of different approaches being used. The project has provided some important insights into the changing nature of relationships between role-players in the education system, and the implications for the success and sustainability of school development initiatives. A report on this work by Jennifer Roberts entitled, *Mapping School Reform in South*

*Africa: An Overview of 12 School Reform Projects*, is obtainable from the JET Publications office, or the JET website.

## **The EAZ Model**

This research comprised an evaluation of the Gauteng Education Action Zones (EAZs), a government-driven intervention aimed at improving the matric results of low-performing schools in the province in 2000. The evaluation provided an in-depth description of the intervention and investigated the contextual factors that contributed to the effectiveness of this intervention. The first stage of this work is presented in a report by Brahm Fleisch, entitled *Prescriptive School Improvement Model Study: Interim Report*.

## **School-based Evaluation**

During 2001, the division was contracted to manage and/or conduct evaluations for the following projects:

- Palabora Foundation's Mahlasedi project
- Siyathathuka Initiative
- Mahlahle
- Northern Cape GEMS
- Imbewu

All of these evaluations entailed school management and classroom practice data. With the exception of the GEMS evaluation, these evaluations also included a learner assessment component. Through these evaluations, the division has consolidated a comprehensive evaluation model which places learner performance at the core of the design and incorporates interviews, observations and questionnaires at the school and classroom levels.

However, as school development initiatives gradually move towards a more systemic approach that focuses on the capacity of the district offices to provide both support for and pressure on schools, the key missing element from evaluations has been a systematic focus on the impact of programmes on district offices. District offices are increasingly being viewed as critical sites of intervention to ensure long-term improvement of the schooling system. The Mahlahle project and the QLP have both provided the division with the opportunity to track changes at the district level, and to investigate how this change impacts on the success of the project as a whole.

## **Learner Assessment**

The division has developed a set of tests for grade 3 and 6 learners which aim to determine the level of reading and numeracy of pupils in the schools in which interventions were planned. Systemic information on children's levels of learning is important for a number of reasons. First, school development initiatives need a benchmark so as to develop an intervention appropriate to the pupils' level of development. In addition, this information provides a baseline against which to assess the development of pupils, so as to track progress and the impact of the intervention on pupil learning in these schools.

During 2001, the division received numerous requests from projects to conduct learner assessment. There has been a steady increase in the demand for learner performance as a means of effectively measuring the outcomes of school-based interventions. The division conducted literacy and numeracy tests on 17 250 learners in 900 schools across 11 different projects in five provinces.

Following on from successful application of grade 3 assessment tools in 2000, the division piloted its grade 6 assessment tools in the Mahlahle project in early 2001. Subsequently, the division has adopted a strategy of, wherever possible, combining grade 3 and 6 assessments to gauge performance at different levels. This



approach was used on behalf of the following projects or organisations: Imbewu, Palabora Foundation, Siyathathuka, Catholic Institute of Education, Promat, and Scientific and Industrial Leadership Initiative (SAILI). In other instances (Western Cape Education Department, School Development Unit, Mahlahle and the Cadbury School Development Initiative) either the grade 3 or grade 6 tests were used.

At the secondary school level; learner performance data collected by the Human Sciences Research Council (HSRC) for Mahlahle and the QLP have been integrated into our database and provide results on 9 400 grade 9 learners and 6 800 grade 11 learners.

## **CDE Maths and Science Project**

JET has provided part-funding to the Centre for Development and Enterprise (CDE) for a policy study into maths and science performance at the matric level, with the aim of investigating factors that underlie patterns of performance, and the impact thereof on both higher education and the job market. The project will make recommendations on practical interventions aimed at improving performance in matric maths and science and increasing access to higher education.

## **Mahlahle FET Study**

As part of the Mahlahle project, the division, in collaboration with the School Development Support Division, undertook a study to better understand the crisis around enrolment in key subjects in Mahlahle schools. This was initiated following the publication of the findings of the *Secondary Schools Baseline Report*, which noted a steep decline in learner enrolments in grades 10 to 12. The study analysed grade 12 performance trends in Limpopo Province with specific reference to learner performance in key subjects and then undertook a review of school-level factors which influence subject choice, particularly in key subjects (mathematics, science and accounting). The purpose of this study was to inform the operation of the existing Mahlahle and to begin considering factors which would need to be addressed should the project be expanded into grades 10 to 12.

## **Teacher Education**

In mid-August 2000 JET was contracted by the DoE through the United Negro College Fund to:

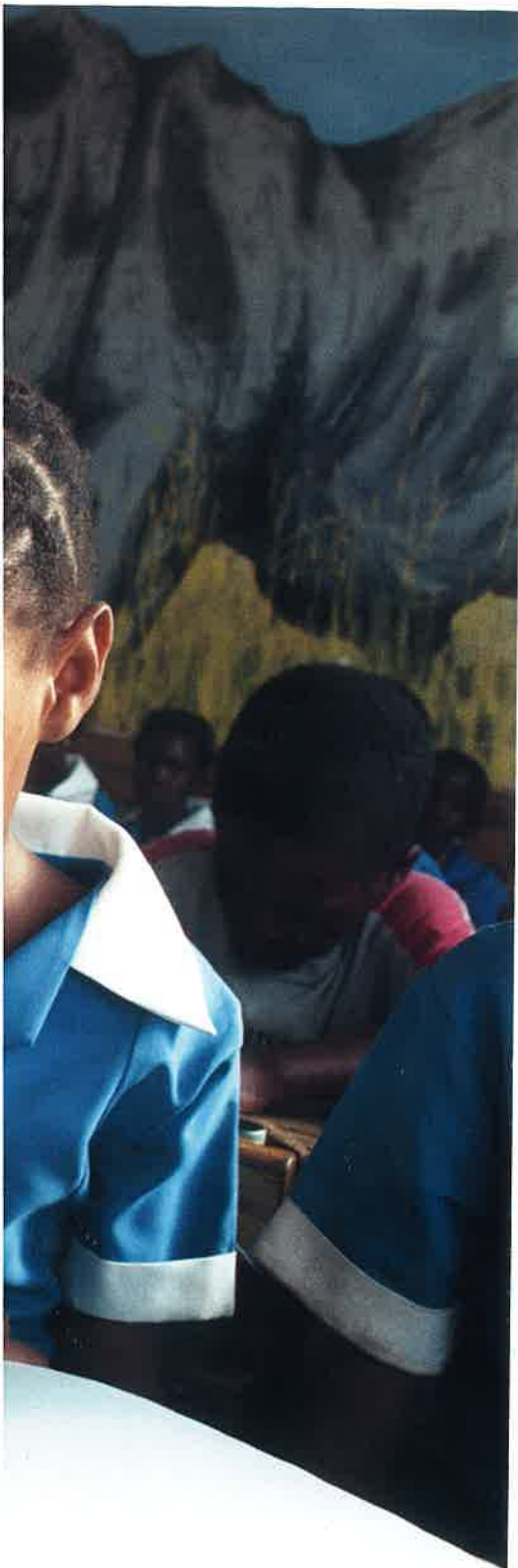
- facilitate the incorporation of designated colleges of education into higher education institutions (HEIs), and
- undertake research to inform the development of a national teacher education plan.

JET's responsibilities with respect to the incorporation process were to:

- provide information to the provinces, designated colleges and receiving institutions on the processes, procedures and possible models required for the incorporation of teacher education colleges into higher education, and
- provide the DoE with reports on the progress of each of the incorporation processes and agreements.



JET's report to the DoE on the National Teacher Education Plan focused on teacher education programmes at HEIs and particularly programmes which lead to qualifications. This includes both pre-service and in-service programmes. The report locates this form of teacher education in the broad legislative and bureaucratic developments in teacher education. This report, written by Luis Crouch and Penny Vinjevold and entitled *Turbulence or Orderly Change? Teacher Supply and Demand in the Age of Aids*, is available on the JET website.



### **Research Training Programme**

In early 2001, the division initiated a research training programme aimed at individuals in NGOs, HEIs and government, who are responsible for commissioning and managing large-scale school-related research projects. The division recognised the need to build capacity both within JET and in the country in general to manage and conduct research that is of sufficient scale to provide meaningful input into policy processes. Through open tender, the project was awarded to a consortium of the Universities of Cape Town and Stellenbosch, and JET has provided funding for the pilot year of the programme, with the aim that these institutions will sustain the programme beyond this pilot phase. The pilot involves internationally renowned lecturers in quantitative and qualitative school-based research and emphasises the development of local expertise to take the programme forward.

### **FURTHER EDUCATION AND TRAINING AND WORKFORCE DEVELOPMENT**

The division adopted a conscious strategy to expand the focus of its skills and expertise within the skills development terrain. Placing a particular emphasis on the evolving role of FET the division has developed, through its work, important insights into the types of measures needed to determine successful outcomes of college and workforce-related interventions. This work is guided by the goal of investigating the impact of various programmes operating within the National Skills Development Strategy and aimed at raising the skills levels and concomitant job creation levels of the majority of South Africans. JET's work in this field includes the following projects:

#### **Evaluation of the Colleges Collaboration Fund**

The Colleges Collaboration Fund (CCF) is a five-year R100 million Business Trust funded project, managed by the National Business Initiative (NBI), and aimed at supporting the DoE in merging and transforming technical colleges into effective and responsive public FET institutions. The division has been commissioned to provide an evaluation of the CCF on a formative basis and to determine the impact of the project on the college sector. During 2001 the division completed the baseline of a national sample of FET colleges, and formulated a set of measures to track changes during 2002 to 2004. In addition the division undertook micro-evaluations of CCF activities to establish their impact in the colleges.

The baseline study was built around the criteria for expected levels of functioning in colleges with respect to governance and management, programmes, learner support, human resource development and marketing and communication. The findings demonstrate noticeable trends across the college sector which indicate the levels of inequality in resources and quality. These findings suggest that significant levels of investment will be required for the sector to realise its potential contribution to economic growth. The DoE has identified mergers as a critical way to address these inequalities. The CCF is providing support to the DoE in this merger process and will be providing capacity-building and institutional development services at the college level. The evaluation will track changes in these colleges to establish whether these interventions help colleges to become more effective and responsive.

### **Evaluation of JET's Workforce Advising and Support Services Pilot**

The division was contracted to evaluate the Workforce Advising and Support Services Pilot project, which was conducted in Pretoria with retrenched workers from the Ford Motor Company. The evaluation aimed to both inform the design and implementation of the pilot in other sites, and measure its impact and participants' satisfaction with the programme. The evaluation took place in two stages. The first reviewed the project design and assessed various stakeholders' responses to the programme and included recommendations for future implementation. The second phase took place approximately five months after participants had completed skills training courses and aimed to assess the extent to which participants had managed to use these skills to find work and support themselves and their families. The evaluation also assessed participants' satisfaction with the training received and the extent to which the programme as a whole had changed job-seeking behaviours.

### **The Technical Colleges Responsiveness Study**

The Technical Colleges Responsiveness project is a joint initiative of the division and the HSRC. The aim of this project is to develop and pilot a methodology to track the destinations of graduates from FET colleges and to assess the extent to which their education is leading to meaningful employment. The project adopts a comprehensive research design, combining the Graduate Destination Survey with a survey of Employer Satisfaction, an Institutional Profile and a Labour Market Analysis. As of the end of 2001, the Graduate Destination Survey had achieved responses from 3 500 1999 graduates, representing a 15% sample of the total number of FET graduates nationally. The results of this survey, combined with the other components of the project, will be published in a book for release in the second half of 2002.

### **ETDP SETA Sector Assessment**

The Education, Training and Development Practices (ETDP) SETA awarded JET and the HSRC a joint tender to conduct a quantitative profiling and qualitative assessment of the ETD sector. The profiling is aimed at providing quantitative data about the sector, which includes NGOs, private schools, HEIs and government departments. The assessment comprises documentary analysis of existing reports and strategic interviews about the skills needs of ETD practitioners across the sector (schooling, FET, Adult Basic Education (ABET), Early Childhood Development (ECD) etc) and the quality of provisioning in these areas. In addition, expert papers were commissioned in the areas of Information and Communication Technology (ICT) and its impact on skills development, the role of Learnerships in skills development and the likely impact of HIV/AIDS on skills needs. The findings of the profiling and the assessment will be used to determine key priority areas for skills development for the different constituency members of the SETA.

# DIVISION FOR LIFELONG LEARNING

*Alan Ralphs*

## RECOGNITION OF PRIOR LEARNING

A continuing focus for our work in the field of adult education is on RPL and this includes the provision of a range of services and programmes to support the extension of adult and experiential learning across the formal institutions and in the world of work. Our activities prior to 2001 were largely funded by the Ford and Kellogg Foundations but the challenge in 2001 was to find a new and sustainable basis for continuing this work. Our track record and expertise led to a number of new contracts, most notably in the development of RPL policy with the Committee for Technikon Principals (CTP), SAQA, the SA Nursing Council, and the Manufacturing, Engineering and Related Services SETA (MERSETA). Each of these contracts is briefly described below, as are a number of other projects in which we played a central and formative role in 2001.

### *RPL and policy formulation*

JET was contracted by SAQA in May 2001 to develop a draft national RPL policy to assist the newly established Education and Training Quality Assurers (ETQAs) and accredited providers in the



*Dr Catherine Odora-Hoppers (HSRC), Rachel Prinsloo (Technikon SA), Kealapa Mothala (SADTU), Professor Bennie Anderson (UFS), comprised the panel that commented on the strategy document and way forward at the RPL conference held on 3-5 October 2000*

development of an approach to quality assurance for all qualification/unit standard-based RPL assessments in South Africa. Michelle Buchler, the project manager at JET, facilitated an extensive process of public consultation around key issues and perspectives on the development of such a policy. This was combined with an extensive review of existing local and international literature after which a national workshop was held with key stakeholders to begin working on the main elements of the new policy. The draft document was submitted in February for review by the SAQA executive and subsequently for public comment on 04 March 2002.

In addition to the SAQA policy process, the division was also contracted to assist the SA Nursing Council ETQA, the MERSETA ETQA, and the CTP in the development of their respective sector-focused RPL policies. The CTP RPL Policy, which was launched on 26 September 2001, will serve as a framework for RPL implementation in the entire technikon sector, and is therefore a critical contribution to the integration of new RPL practices in the higher education sector.

### *Assessor training and RPL*

The roles of assessors and advisors are central to the implementation of RPL in the formal institutions and in the workplace.

In 2001 the division took its first steps in the direction of assessor training with an initial focus on the role of the 'occupationally directed' (workplace-based) assessors. This emerged from the evaluation we undertook in 2000 of the assessor training course run by the Metal and Engineering Industry Training Board in that same year. This work led to a second request from members of the New Tyre Chamber to assist in the design, planning, and implementation of an RPL pilot project in 2001, involving 30 adult workers and 24 assessors

from the six main tyre manufacturing plants in the country. A key feature of the project was the development of two new courses: one for the assessors and a one-day preparation course, called Lungisa, for all participating workers.

Participation and completion rates for this project were excellent despite the fact that a dispute in wage negotiations led to an industry-wide strike just before the RPL assessments were due to begin in August. Only one plant failed to submit assessment results on time for the evaluation in October 2001. The provisional results available in November 2001 indicated that 20 candidates had been assessed against 40 elective unit standards and found competent against 31. A major contributing factor in those that were found 'not yet competent' was the fact that job functions were not fully aligned with all the outcomes included in the standards.

This project was successfully completed in November 2001 and the division was subsequently contracted by the MERSETA to develop and deliver a 'top-up' training course that would bring certified assessors in the sector 'up to speed' with the new SAQA registered assessor unit standard. This project got underway in December 2001.

Our second venture in assessor training is a partnership with the CTP for a project that will produce an assessor training course for academics based in the HEIs. This project will support the development of technikon staff to implement RPL in ways that will meet the quality assurance criteria of SAQA and the Higher Education Quality Council (HEQC) and is scheduled for completion and testing by August 2002.

It is important to note that our ability to take advantage of these opportunities in future will depend on our successful accreditation as a training provider and this is an important consideration for 2002.

### ***Developing a regional model for RPL in higher education***

At the end of 2000, the division initiated the idea of a regional RPL pilot project in order to explore more cost-effective ways of providing RPL services that did not require institution-by-institution models of provision, particularly in a context of dwindling resources for education and training providers. This idea was discussed with the eastern seaboard Association of Tertiary Institutions (esATI) which is representative of all six HEIs in KwaZulu-Natal and has an equal mix of universities and technikons. A steering committee was established and over a number of months developed a project proposal that was submitted to the esATI Governing Board in November. The Board indicated support for the project, and proposed that workshops be held at all member institutions during the first half of 2002, before a final decision on the viability and future of the project was made. The regional model being proposed is that of a centralised RPL office that will coordinate academic staff of all institutions into core groups of RPL advisors and assessors.

### ***RPL research and development***

The division has maintained a small RPL research and development programme ever since it first secured grants from the Kellogg and Ford Foundations in 1996. In November 2000 the JET Board agreed to provide further funding of R500 000 to sustain this programme in 2002/3. Work on the programme in 2002 is limited to the development of a framework which sets out the strategic priorities and terms of reference for the programme. By the end of 2001 we had secured a number of proposals for projects that will draw from, and feed into, current RPL projects and new initiatives. These include two surveys aimed at an empirical and conceptual mapping of RPL activities in HEIs and in the workplace across South Africa.

### ***Advocacy and networking***

A highlight for the division in 2001 was our participation, together with several members of the MERSETA and esATI, in the Canadian conference on Prior Learning Assessment in Belleville, Ontario. Alan Ralphs,

divisional manager at JET, gave the keynote address at the conference in which he spelt out the history, structure and challenges facing the introduction of RPL in the new education and training system in South Africa.

The regional project study group went on to complete the second part of the study tour, with visits to the PLA Centre in Halifax (Nova Scotia, Canada,) and the Vermont State Colleges system (located in Montpelier, Vermont, USA). This part of the study tour presented the group with two very useful RPL models to take forward as part of the planning process for conceptualising, designing and implementing a regional pilot project in South Africa.

## YOUTH DEVELOPMENT AND LEARNERSHIPS

In 1999 the Trust decided to focus its involvement in the area of youth development on projects that would stimulate new partnerships between government and civil society in developing sustainable models of education and training consistent with the principles of youth development and economic participation.

In August 2001 the Board approved funding in the amount of R1,2 million for the purpose of grant-making to selected organisations to facilitate participation in evaluation activities aimed at elaborating the lessons of workplace-based learning. The evaluation is being undertaken as a collaborative venture with six organisations:

- The Business Skills Development Centre
- The Skills Training & Education Centre
- The Keyboards Organisation
- The School Leavers Opportunity Trust
- The Bergzicht Training Centre
- LEAF College

All of these organisations have integrated workplace learning into their certificate courses and are proactively seeking accreditation as providers of new skills development and learnership courses. The evaluation, which is to be conducted locally, will produce valuable data on the following aspects of workplace-based learning:

- The *preparation of the learner*: the nature and quality of the training that takes place before the workplace-based component of the programme, and the specific preparation of the learner before placement occurs.
- The *instructional design* of learning activities specified (and those unspecified but nevertheless significant activities) for the workplace-based experience.
- The *working environment*, which includes the culture, conditions and incentives for learning and working; also the preparation of the employer and other workers for the 'new learner' in the workplace.
- The nature and quality of the *mentoring*-learning relations, support systems and assessments that feature in the workplace.
- The nature and efficiency of *communication* between all stakeholders across the whole spectrum of workplace-based learning activities, before, during and after the programme.

The evaluation strategy will be implemented over the period from November 2001 to May 2002 and JET will convene a national seminar in June 2002 at which organisations can share their lessons and recommendations.

# WORKFORCE DEVELOPMENT

*Dasi Moodley*

The Workforce Development Division (WFD) is the newest of the divisions at JET. It was established in 2001 to provide an array of innovative learning options for South African workers.

The programmes and services of the WFD are targeted at the opportunities for training created by the Skills Development Act. This suite of services constitutes a comprehensive model of workforce advising and support. Part of the model has been adapted from a learning systems model developed by the Chicago-based Council for Adult and Experiential Learning (CAEL). The model is built on the premise that career and education advising and counselling is an essential component in any successful adult learning venture. CAEL is providing technical assistance to JET for the adaptation and implementation of this model in South Africa.



Back row - left to right: Gloria Mkhize, Sizwe Mafunga, Letshego Mokeki and Daphne Els  
Seated in front - left to right: Nick Taylor, Diana Bamford-Rees and Dasi Moodley

The financial support for building the infrastructure of this new division within JET, and for conducting the pilot project and evaluation thereof, comes from the JET Board and the Ford Foundation. Employer/union and government funds support a small portion of the pilot project. Beyond the pilot project, all offerings are on a fee-for-services basis.

## JET'S WORKFORCE DEVELOPMENT SERVICES

The services available through JET's WFD are:

- **Skills audit and preparation of workplace skills plans**

It is important for employers to know the capacity of their workforce before factoring in any development intervention.

- **Preparation for skills training**

The Dipaakanyo workshop, a three-day group counselling workshop, prepares employees for career planning, goal setting and achieving these goals from skills training.

- **Individual advising and counselling sessions**

Following the Dipaakanyo workshop, individual counselling sessions provide the opportunity for each employee to examine his/her personal career goals and learning agenda in a supportive environment with a knowledgeable advisor. During these sessions, the employee creates a personal development plan.

- **Managing skills investment**

JET assists employers with the implementation of their skills development plans by: developing criteria

for selecting education and training providers, brokering with providers, helping providers to redesign and adapt curricula to meet the needs of candidates, registering the employees on the learning programmes, tracking employee progress and providing learner support.

■ ***A computerised tracking and reporting system***

Through a web-based information and accounting system, JET can assist employers with the management of their learning programmes by: verifying employee eligibility, processing application forms and payments to service providers, tracking service utilisation by demographic and other variables, and generating progress reports with participation, performance, completion and cost data.

■ ***Evaluation***

A systematic evaluation of the impact of learning programmes enables clients to quantify their return on investment in education and training and to measure the effectiveness of the methods deployed.

■ ***RPL assessor training***

Workshops and an on-line assessor training course are available to employers and SETAs for training workplace assessors. Training is also available for practitioners in further and higher education who wish to be trained as assessors of learning for the purposes of appropriate educational placement and/or award of educational credit.

## **OVERCOMING BARRIERS TO SUCCESSFUL WORKFORCE DEVELOPMENT**

The South African policy and legislative framework - the Skills Development Act, the National Skills Fund, the Social Plan, the SETAs and SAQA - create a positive environment for adult education and training opportunities to emerge. In this favourable climate for workforce development, there are, however, barriers that must be overcome in order for these initiatives to succeed. The services available through JET offer solutions to overcoming many of these barriers.

- Even when education and training opportunities are available to workers, there may be barriers which will limit the maximum utilisation of training and reskilling opportunities. For the workers such problems include, lack of funds, transportation problems, lack of time to study or attend courses, extended time away from a learning environment, previous negative experiences in school, fear of failure, and lack of information. The group and individual advising and counselling platform, through Dipaakanyo workshops and follow-up individual advising sessions, provided by the JET model are designed to enable workers to build and enhance their learning skills and support networks.
- Employers and organised labour also encounter barriers in terms of providing education and training for their workers. For instance:
  - Information: many employers are not familiar with how to organise effective training and education so as to maximise the impact of such programmes on continuous improvement, and work reorganisation.
  - Money: a lack of financial resources to pay for education and training is a particular concern for companies with minimal or non-existent education and training budgets.
  - Time: many employers cannot afford the staff time needed to adequately administer an internal workforce education and training programme.
  - Short-term mentality: employers may equate education and training with short-term remediation of a specific problem, rather than focusing on broad education and skills development.
- Since many of the funds set aside for workforce training are relatively new, the process of accessing them is not yet adequately established, thus delaying, or in some cases eliminating, use. The JET WFD tracking and reporting system can help SETAs and individual employers to manage and disburse the education and training funds in a responsive manner.
- Most South African education and training institutions are not ready to respond to the adult population in general in terms of capacity, policy, pedagogy, or curriculum. Training and education providers often fail to provide the types of programmes that meet worker and employer needs and workforce demands. Built into the JET WFD model is an institutional development component which will enable participating



education and training providers to interact with organised labour and employers in order to develop courses and programmes that respond to the needs of the adult population.

- Employers are often reluctant to participate in the educational services that are available, due to a lack of trust that the services are relevant and will indeed fill a workforce education gap. There is a need in South Africa for a neutral agency that can provide reliable information on education and training programmes – such as what courses or programmes are relevant and how they can be accessed. JET is positioned to perform this neutral, intermediary role.

## THE PILOT PROJECT – SERVICES DELIVERED

The first project of the division was a pilot project serving retrenched auto and mine workers. The pilot, designed to reach 1 000 retrenched, is stakeholder-driven. The core partners are: National Union of Mineworkers (NUM); National Union of Metalworkers of South Africa (NUMSA); the Department of Labour (DoL); Mineworkers Development Agency (MDA) and JET. The sites for project delivery are: Newcastle in KwaZulu-Natal for the mining industry, and a site in Pretoria and Port Elizabeth respectively for the motor industry.

### *The auto sector.*

In January 2001, the advising and support services programme was launched with 111 individuals who had been formerly employed by the Ford Motor Company of Southern Africa at its Pretoria plant. The majority of programme beneficiaries had worked for Ford in excess of 10 years with some having been employed by the motor company for more than 20 years. All had been unemployed since 1999 or before.

All participants attended a three-day Dipaakanyo workshop and three one-hour individual advising sessions. With assistance from a trained education/career advisor, each participant completed a personal development plan which details their education and career goals. Eighty-two completed skills training programmes; 17 were rehired by the company before enrolling in training courses; and 11 decided not to continue with the programme (a 12th person died in tragic circumstances). The skills training programmes selected included: auto mechanic, auto electrical, welding, plumbing, carpentry, bricklaying, catering, driving (codes 8-14), small business development, and computers. The education and training providers were chosen on the basis of their accessibility to the participants; their accreditation status; their experience to serve adult learners generally and retrenched workers specifically; their capacity/infrastructure; and the cost and duration of their programmes.



*Workshop participants at a Dipaakanyo workshop*

A sample of post-training interviews informs us that some participants have secured employment in the formal sector but more are using their new skills within their immediate communities for local employment opportunities.

In December 2001, JET was invited to meet with a small group of retrenched auto workers (15) from the Ford Engine Plant in Port Elizabeth. These former Ford employees were

seeking to increase their communications and numeracy levels on the ABET scale to levels 4 and 3 respectively so that they could be considered for re-employment by the company based on new hiring policies. A Dipaakanyo workshop and enrolment in ABET training classes is scheduled for January 2002.

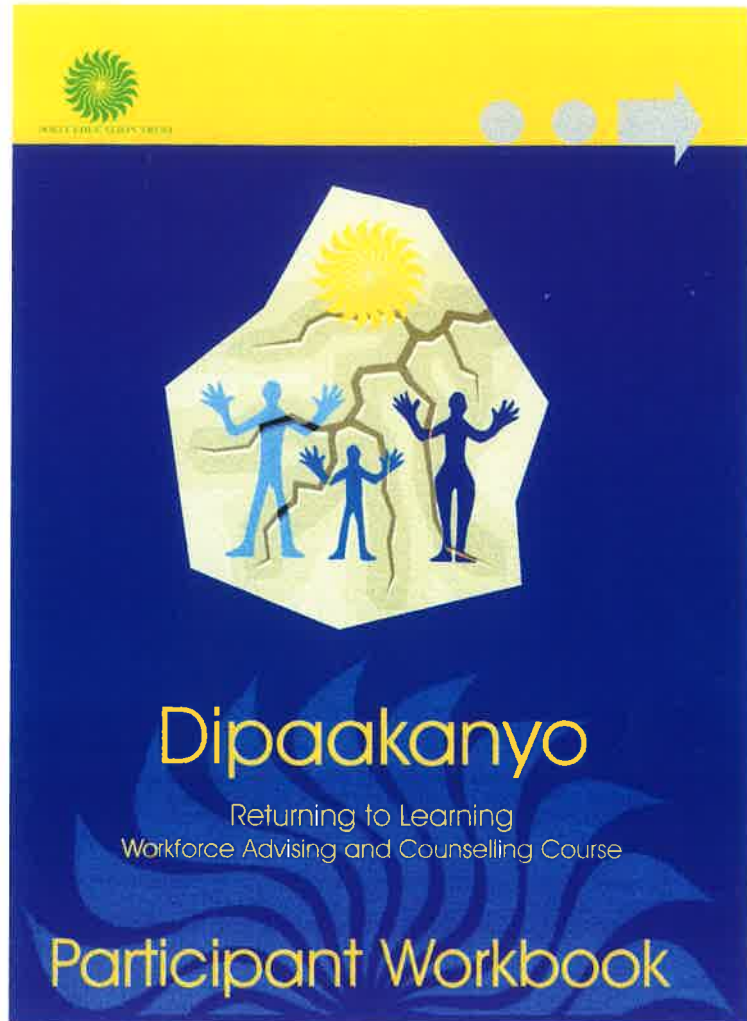
Plans are underway to deliver pilot programme services to another group of several hundred retrenched auto workers in Pretoria in early 2002.

For retrenched auto workers, the costs of the Dipaakanyo workshops, the fees for the skills training programmes and subsistence allowance for meals and transport were paid by the Automobile Manufacturing Employers/NUMSA Work Security Fund.

### *The mining sector*

In preparation for serving 500 retrenched mine workers in Newcastle, KwaZulu-Natal, JET has been working throughout 2001 with the national, provincial and local offices of the DoL, the Department of Minerals and Energy (DME), the local Newcastle social planning committee, the MDA, and NUM to:

- select and train a local network of education advisors,
- brief local education and training providers concerning the needs of these retrenched workers,
- employ a site director to co-ordinate the planning and implementation of the pilot project in Newcastle,
- conduct feasibility studies regarding job creation opportunities, and
- seek additional resources for subsistence while in training, and small business start-up funds.



The role of a dedicated skills training intermediary is increasingly required in the South African workplace. JET WFD is poised to play this important role for employers that do not have the internal capacity to make skills training a key success for their organisation.

# COMMUNITY HIGHER EDUCATION SERVICE PARTNERSHIPS (CHESP)

*Jo Lazarus*

The White Paper on the Transformation of Higher Education (1997) makes specific references to the role of community service within the overarching task of transforming the higher education sector in South Africa. It calls on institutions to 'demonstrate social responsibility... and their commitment to the common good by making available expertise and infrastructure for community service programmes'. The White Paper further states that one of the goals of higher education is 'to promote and develop social responsibility and awareness among students of the role of higher education in social and economic development through community service programmes'. The White Paper shows receptiveness to 'the growing interest in community service programmes for students' and gives in-principle support to 'feasibility studies and pilot programmes which explore the potential of community service in higher education'.

In response to the White Paper, JET launched the Community – Higher Education – Service Partnerships (CHESP) project in January 1999. The aim of the project is to develop and research pilot academic programmes with the objective of:

- strengthening partnerships between local communities, HEIs and service agencies,
- contributing to the reconstruction and development of local communities,
- making higher education policy and practice more responsive and relevant to community needs, and
- enhancing service delivery to participating communities.

In April 1999 JET approved grants to eight HEIs to develop institution-wide policies and strategies for community engagement through mainstream academic programmes. In 2001 JET approved a further grant to six institutions to implement pilot academic programmes designed to achieve the above objectives. These grants were made possible through support from the Ford and Kellogg Foundations and JET itself.



*Workshops to assist community members, academics and service providers in developing service-learning courses*

## Development of Pilot Academic Programmes

The White Paper specifically calls for 'feasibility studies and the development of pilot programmes to explore the potential of community service in higher education'. At a meeting of technikon and university Vice Chancellors, and representatives from the DoE, Council for Higher Education (CHE) and the South African University Vice Chancellors' Association (SAUVCA), convened by JET in July 2000, the development and research of pilot academic programmes integrating community service and learning (i.e. service-learning)

was identified as the most important and immediate strategy for operationalising the reconstruction and development mandate of the White Paper. During 2001 JET supported the development of 80 pilot service-learning courses across 42 different academic disciplines involving more than 3 000 students ranging from first year through to masters level. Each course is designed as an intervention to address a specific community development priority.

Community development priorities addressed through these courses include: HIV/AIDS; literacy; library services; youth development; job creation; skills development; education of prison inmates; crime prevention; violence; upgrading of built environments; development of recreation facilities; legal aid; upgrading of schools; school education; and rural resource management, to name just a few. Ideally, each course should integrate teaching, research, and service. Courses are developed in partnership between community leaders, academics, and service agencies. Each course is accredited and students spend at least 20% of the course in a community-based learning experience.



*Professor Eleanor Preston-Whyte, Deputy Vice Chancellor, University of Natal at student feedback session. One of her comments after the session was 'this is curriculum development par excellence'.*

## Lessons Learnt

During 2001 JET commissioned a systematic external monitoring and evaluation of the CHESP pilot service-learning courses. The intention of this research is to generate data that will inform higher education policy, practice and resource allocation at a national, institutional and programmatic level. A few salient points emerging from this research include the following:

### *About higher education institutions*

Service-learning courses cannot be conceptualised and implemented effectively in isolation from participating communities and service providers. Good relationships between communities, the institution, and appropriate service agencies enhance the effectiveness of a service-learning course in terms of its benefits to the community, students, the academy and service providers.

A supportive environment within the HEI itself is essential for the development of effective service-learning courses. Leadership from the top is critical. All HEIs participating in CHESP have developed an institution-wide policy and strategy for engaging in the reconstruction and development of local communities through mainstream academic programmes and have identified this as a strategic priority. Some institutions have committed considerable resources, including executive positions, to operationalising these policies and strategies. Most participating institutions have established a centralised 'service-learning office'.

### *About student learning*

Generally the service-learning courses appear to have had a positive effect on students' learning. They provided students with the opportunity to link theory and practice, enrich and deepen their learning

experience, enhance their personal growth and gain insights into their future career choices. To put it in the words of the students:

*'I think it is important to put theory into practice as this is the only time when you are able to think critically and question the theory that you have been exposed to. It also shows discrepancies in theory and enables you to understand theory better since you can see how it applies in a real context'.*

(Psychology student)

*'Learning in a community setting is essential as it opens one's eyes to the reality of the theory that we are being taught. This course has been invaluable to me'.*

(Psychology student)

*'Service-learning was such an eye-opening experience and has made a major difference in my life and perception of disadvantaged communities. Now I know that I can make a difference. However little I think it may be, to some people it can be a major change'.*

(Commerce student)

*'Community-based learning has been most helpful in my career choices. I have realized that I am no longer doing law for money, but for the benefit of the community. Also, I have realized that there are lots of injustices happening in rural areas. Lots of students in our post-apartheid era lack knowledge on issues such as human rights, democracy and the constitution etc. This should be a compulsory course'.*

(Law student)

*'In terms of community work, I think the Drama department did a very good job. They achieved what many departments in the university could not do. It was a great achievement to my career and I think more community work should be added. Even after our visit to the prisoners I still carry on going there. It was a turning point in my university career'.*

(Drama student)

### ***About the community***

It is too early to have any evidence of impact on the quality of life of communities. However, community members have been overwhelmingly positive about their participation. In terms of perceived benefits, respondents identified the attention given to community problems and the knowledge gained by the community because of the partnership with the HEI and service providers as the most significant outcomes. Respondents felt that they in turn contributed to greater community awareness and to the learning experience of students. The community also learnt more about the HEI and how they might access its information, services and expertise. Community partners would like to be more involved in the planning and management of courses and see more academics and students involved in their community.

### ***About service agencies***

Service agencies are important partners in the planning, implementation and sustainability of service-learning



*Third-year Psychology student at the University of Natal reflects on her service-learning experience*

courses. They provide a community-based infrastructure and expertise for community access, have extensive experience in the application of knowledge, and potentially provide continuity and sustainability for service-learning interventions.

Service-learning offers service providers the opportunity to underpin and enhance their practice with the most recent theories and research. The participation of academics and students also alleviates the service burden to a certain extent. Generally service providers were very positive about their participation and its perceived benefits including partnering with the HEI.

### *About higher education policy*

During 2001 the DoE commissioned JET to develop a Position Paper on community service in South African higher education. Following a draft discussion document interviews were conducted with a wide range of higher education stakeholders including DoE officials, the CHE, SAQA, and technikon and university Vice Chancellors to elicit their views on potential policy directions. Currently the lessons learnt through the CHESP pilot service-learning courses are informing the final shape of the Position Paper.



*Students at the University of the Western Cape reflect on their service-learning experience*

In its Founding Document the HEQC of the CHE identified knowledge-based community service as one of the three areas for accrediting and quality assurance of academic programmes. During 2001 the HEQC commissioned JET to use CHESP as the vehicle for generating standards for the accreditation and quality assurance of knowledge-based community service and to develop mechanisms for measuring these standards.

# FINANCE AND ADMINISTRATION

*Jim Wotherspoon*

**J**ET Education Services continued its operations during 2001 alongside the Trust. The official launch of the new section 21 company in November at the Hilton Hotel marked a watershed as the new company prepared to offer its services to existing and new clients and to continue the mission of the Trust in its new legal form. The Trust will continue to operate in tandem with the not for profit company until its funds are disbursed or transferred to the new company.

The activities of JET Education Services during 2001 covered:

- QLP, a R139 million project funded by the Business Trust over five years.
- School Quality Improvement Programme (SQIP), also funded by the Business Trust in the amount of R5,5 million over two years.
- Workforce Development, a project funded by the Ford Foundation and JET to the value of R30 million over three years.
- In addition to the above, the company earned R780 000 in fees from financial and evaluation services to the Colleges Collaboration Fund managed by the NBI.



*Left to right: Buyi Diba, Tebogo Kibe, Dehbie Mogorosi, Jim Wotherspoon, Tonya Alexander, Amaral Soma, Hawa Hoosen, Patrick Madima, Maureen Otto and Elizabeth Koaho*

The Trust disbursed R11,3 million to approved projects during the year 2001 and R4,7 million to internal projects. In addition the Trust disbursed R1 million to primary schools through its Primary and Secondary Fund on behalf of EQUIP. This brings the total disbursements to approved projects to R419 million since the Trust was formed in 1992.

Administration expenses continue to be closely controlled and the net operating costs for 2001 amounted to R2,2 million. However, if consideration were taken of donor contributions authorised for management of the JET internal projects, a surplus of R2,6 million would result.

The division continued to contribute to cost recoveries to the overall organisation through external fund management and financial management of projects.

The division also continued to support the other divisions of Lifelong Learning, School Development and Support, and Research and Evaluation. Support to our major projects of QLP and Workforce Development was also provided during the year.

Revised business plans have been prepared for the period 2002/2003 which continue to indicate successful operations for the future of the company.

The Board of Trustees has approved a capitalisation fund for the new company of R16 million. This will enable the new 'JET' to move forward with some level of long-term security. R4 million of these funds has been ring-fenced for specific areas.

JET Education Services will be applying in 2002 for PBO status which, if approved, would give tax exemption to the company under the new section 30 and 10(1)(cN) of the Income Tax Act.

JET Education Services is also registered in terms of the Nonprofit Organisation Act 1997. (Registration No. 015-623 NPO).

## INFORMATION TECHNOLOGY

We currently operate three servers servicing some 30 PCs and laptops. These are now some years old and are likely to be prone to breakdown. We are presently negotiating for an upgrade to our server requirements. Ideally we should have two new servers allowing us to move all our communications requirements through Microsoft Exchange and relocate our data to a second server. The cost of these have escalated with the adverse rand/\$ exchange rate movement.

Our Workforce Development Division also has provision in its budget for two new servers, although these will only be required by June. We need to ensure that any procurement now will not affect our optimum structure for the organisation.

Our network still operates Windows 95 and Office 97. These are also becoming outdated and we intend to standardise with Windows 98 and Office 2000, although some of our laptops support windows 2000 XP. This is the current industry standard.

We have purchased a number of laptops with e-mail and network access. This has improved our project communication. Our desktop publishing (DTP) facilities have produced some high quality publications and continue to support the organisation with in-house expertise in this area. We continue to review our desktop PC requirements and to replace with upgrades within our available funds.

## EXTERNAL PROJECTS AND FUNDS ADMINISTERED DURING 2001

### IMBEWU

Funded by the Department for International Development (DFID).....R85 million

### COMMUNITY HIGHER EDUCATION SERVICE PARTNERSHIP

Funded by the Ford Foundation.....R16 million

### SIYATHUTHUKA PROJECT

Funded by the Royal Netherlands Embassy, Pretoria.....R10 million

### SUB-SECTORAL SUPPORT FOR FET POLICY

Funded by the Royal Netherlands Embassy, Pretoria.....R1,5 million

### COLLEGES COLLABORATION FUND

Funded by the Business Trust..... R100 million

### QUALITY LEARNING PROJECT

Funded by the Business Trust..... R139 million

### DEVELOPMENT COOPERATION IN INCLUSIVE EDUCATION

Funded by the Danish International Development Agency (DANIDA).....R13 million

### IMBEWU TRANSITIONAL PHASE

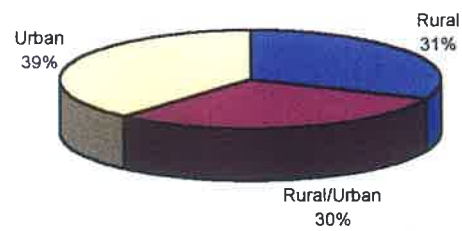
Funded by the Department for International Development (DFID).....R4,3 million

*In addition to the direct administration of these funds, JET provides technical services to the District Development and Support Programme for the management of a grant of R200 million from USAID.*



# PROJECT STATISTICS

## Project percentage by Area(1992 - 2001)



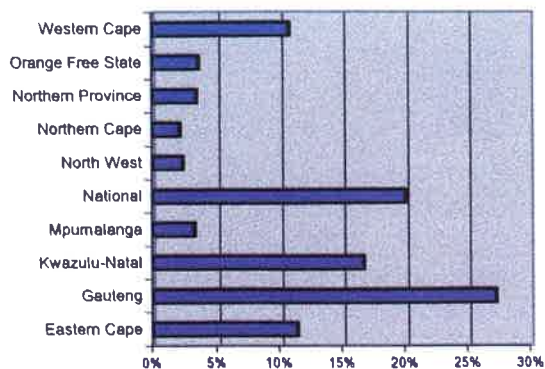
### NEW GRANTEES APPROVED BY YEAR

SECTOR	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	TOTAL
Adult Basic Education	17	31	49	61	2	0	0	0	0	0	160
Early Childhood Development	18	21	17	14	0	0	0	0	0	0	70
Vocational & Further Education	3	4	0	0	0	0	0	0	0	0	7
Teacher Development	23	27	27	21	2	0	0	0	0	0	100
Youth Development	9	16	18	16	0	0	0	0	0	0	59
Special Projects	0	1	0	4	2	0	0	0	0	0	7
<b>TOTAL</b>	<b>70</b>	<b>100</b>	<b>111</b>	<b>116</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>403</b>

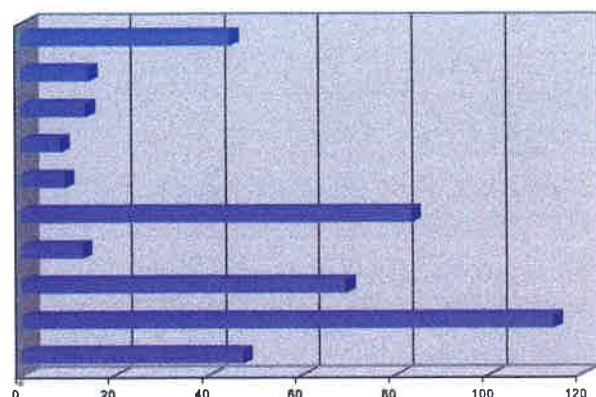
### DISBURSEMENTS 1992-2001 (Rands)

SECTOR	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	Total
Adult Basic Education	393,200	11,214,791	25,096,514	33,456,490	28,243,538	22,539,936	11,697,995	1,496,589	177,212	197,519	134,513,784
Early Childhood Development	82,467	5,776,670	10,615,346	13,459,507	9,320,249	8,844,113	5,647,118	270,650	0	0	54,016,120
Vocational & Further Education	2,261,300	6,892,000	10,196,500	13,988,597	12,004,839	6,447,000	3,197,246	300,000	450,000	500,000	56,237,482
Teacher Development	3,420,340	10,960,749	17,296,210	25,162,030	16,587,600	13,610,021	8,803,252	3,204,587	5,690,975	9,645,219	114,380,983
Youth Development	0	4,361,306	10,077,144	12,325,961	7,307,708	7,001,229	3,544,153	1,015,253	1 811 670	529,750	47,974,174
Special Projects	0	155,000	425,000	605,000	5,670,664	2,000,000	2,040,291	-8,177	0	0	10,887,778
Research	0	0	0	0	0	0	0	0	0	488,832	488,832
<b>TOTAL</b>	<b>6,157,307</b>	<b>39,360,516</b>	<b>73,706,714</b>	<b>98,997,585</b>	<b>79,134,598</b>	<b>60,442,299</b>	<b>34,930,055</b>	<b>6,278,902</b>	<b>8 129 857</b>	<b>11,361,319</b>	<b>418,499,152</b>
<b>JET PROJECTS</b>									<b>2,642,991</b>	<b>4,740,638</b>	<b>7,383,629</b>
<b>TOTAL</b>									<b>10,772,848</b>	<b>16,101,957</b>	<b>425,882,781</b>

### Provincial Distribution % (1992-2001)



### Provincial Distribution - R Millions (1992-2001)



# REPORT OF THE INDEPENDENT AUDITORS

We have audited the annual financial statements of the Private Sector Initiative Joint Education Trust, an extract of which is set out on this page. This extract of the annual financial statements is the responsibility of the Trustees. Our responsibility is to report on this extract of the annual financial statements based on our audit.

We confirm that this extract has been properly compiled from the annual financial statements of the PSI Joint Education Trust for the year ended 31 December 2001. These annual financial statements have been prepared in accordance with South African Statements of Generally Accepted Accounting Practice. We confirm that an

unqualified audit opinion was issued on these annual financial statements.

In addition, at the request of the Trustees, the disbursements on approved projects were subject to a high degree of audit verification and we confirm that no exceptions were noted.

*Deloitte & Touche*

Deloitte & Touche  
Chartered Accountants (SA)  
Johannesburg  
2 July 2002

## ABRIDGED INCOME STATEMENT for the year ended 31 December 2001

	<u>2001</u> R	<u>2000</u> R
Gross contributions received	50 086 769	11 314 174
Interest on funds received	1 120 100	827 426
Donations received	75 000	650
Other income	10 000	-
<b>Total income</b>	<u>51 291 869</u>	<u>12 142 250</u>
Disbursements on approved projects	12 376 319	8 129 857
Disbursements - internal projects	4 740 638	2 642 994
Administration expenses	2 200 215	830 552
<b>Total expenditure</b>	<u>19 317 172</u>	<u>11 603 403</u>
Surplus for the year	31 974 697	538 847
Accumulated surplus at beginning of the year	10 467 795	9 928 948
<b>Accumulated surplus at end of the year</b>	<u>42 442 492</u>	<u>10 467 795</u>

## ABRIDGED BALANCE SHEET 31 December 2001

### ASSETS

Non-current assets	103 727	52 979
Current assets	43 822 525	11 038 892

### Total Assets

### EQUITY AND LIABILITIES

#### Reserves

Special Institutions' Fund	34 847 336	3 162 221
Primary and Secondary Education Fund	1 222 291	2 150 645
General Fund	6 372 865	5 154 929

Current liabilities	42 442 492	10 467 795
	1 483 760	624 076

### Total reserves and liabilities

	<u>43 926 252</u>	<u>11 091 871</u>
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# JOINT EDUCATION TRUST ORGANOGRAM

Board of Directors



CEO: Nick Taylor



Jim Wotherspoon  
Divisional Manager  
Finance and Administration



Dasi Moodley  
Divisional Manager  
Workforce Development



Anele Davids  
Divisional Manager  
Quality Learning Projects



Amarlat Soma  
Accountant



Hawa Hoosen  
HR/Office Manager



Letshego Mokeki  
Project Manager



Daphne Els  
Business Development  
Manager



Michelle Buchler  
RPL Unit Head



Jackie Moyana  
National Coordinator



Moureen Otto  
Accounts Supervisor



Patrick Madima  
Accounts Supervisor



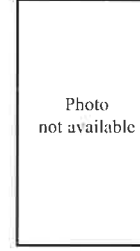
Nazneen Reddy  
Accounts Supervisor



Sizwe Mafunga  
Site Coordinator



Thulani Mngadi  
Site Coordinator



Boitumelo Seboloa  
Site Coordinator



QLP Provincial coordinators



Tebogo Kibe  
Accounts Clerk



Elizabeth Koaho  
Accounts Clerk



Tonyu Alexander  
Accounts Clerk



Debbie Mogorosi  
Receptionist



Bayi Diba  
Records Clerk

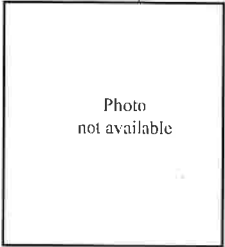


Gloria Mkhize  
Administrator

Management Committee



Kathy Tracey  
PR Manager



Saeeda Anis  
Grants Manager  
DDSP



Anthony Gewer  
Divisional Manager  
Research & Evaluation



Kholofelo Sedibe  
Divisional Manager  
School Development & Support



Hemant Waghmarae  
Divisional Manager  
Special Projects



Grace Moloko  
Assistant Grants Manager  
DDSP



Jennifer Roberts  
Project Manager



Thabiso Nyabanyaba  
Project Manager



Sindi Nyoku  
Project Manager



Leigh-Mae Moses  
Project Officer



Thelma Dibakwane  
Administrator



Thuli Nkosi  
Administrator



Jabu Simelane  
Administrator



Robyn Klein  
Administrator



QLP Provincial Administrators

## FAREWELL TO PENNY VINJEVOLD

**P**enny Vinjevold joined the organisation in August 1993 as the second project officer to JET. In January 1996 she was appointed Divisional Manager, Evaluations, and played a major role in setting up the Evaluations Division.

In December 1998, after nearly five years with JET, she restructured her relationship to JET, as a consultant, but continued to work almost exclusively with the organisation. In January 2001 Penny left JET to take up a Chief Directorship position with the Western Cape Department of Education.

During her nearly nine years at JET Penny was instrumental in developing a more rigorous approach to programme evaluation, which had an enormous influence on the field. One of her principal achievements during this time was her co-authorship of the research volume *Getting Learning Right*.



### NEW PUBLICATIONS

- RPL Challenges in Higher Education and Workplace Practice:**  
*A Training and Policy Conference on the Recognition of Prior Learning*  
Written and Edited by Michelle Buchler and Alan Ralphs October 2000
- Prescriptive School Improvement Model Study:**  
*Interim Report*  
by Brahm Fleisch October 2001
- Education Pathfinders:**  
*A Short History of the Joint Education Trust*  
by David Robbins November 2001
- Accountability and Support:**  
*Improving Public Schooling in South Africa - A Systemic Framework*  
by Nick Taylor January 2002
- Balancing Support and Accountability to Improve School Performance:**  
*National Consultation on School Development*  
Edited by Jennifer Roberts and Johan Muller January 2002



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**JET** EDUCATION  
SERVICES

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