

1 COMMISSION 1: POST PROVISIONING NORMS 2 DISCUSSION DOCUMENT

3 Background

4 As a statutory council, the Education Labour Relations Council's (ELRC) primary responsibility is to
5 represent teacher unions and work closely with the Department of Basic Education (DBE) and
6 Provincial Education Departments (PEDs) to prevent and resolve labour disputes. In addition to their
7 mandate, the ELRC also plays a significant role in ensuring ongoing dialogue amongst stakeholders
8 on pertinent education matters in pursuit of labour peace and quality education in public schools.

9 One critical matter, which has serious economic and social implications for the country, is the issue
10 of educator and personnel post provisioning in public schooling.

11 As noted in the 2017 Education Indaba report, the Indaba delegates raised the related PPN concerns
12 and recommendations for the work stream:

Concerns

- Credible HR Planning
- HR Planning tools that are practical and sector specific for implementation
- Recognition of socio-economic factors in PPN planning, e.g. educator and learner needs
- PPN must be pro-poor and used as a transformative tool
- Uniform standards to address the challenges of small schools, e.g. minimum number of teachers for small primary and secondary schools
- Adequate provision to address IIAL and remedial teaching
- Challenges of undocumented learners; key problem that impacts allocation of funding
- Redress fund

Recommendations

Interim (2017)

- Review and amend tool to address weightings, e.g. maths and technical maths, and effort necessary to teach these subjects
- Prepare PPN tool to include Gr-R for implementation in 2019
- Standardise the PPN processes and provide standard operating manuals
- Minimum resource model for schools; with special attention to inclusive education and ECD
- Establish task-team (critical social partners) to review the PPN policies and procedures
- Ensure data quality (SA-SAMS)

Long-term (2018/19)

- Develop new online tool
- FFC formula to be reviewed and amended to cater sufficiently to deliver quality education

13 As a resolution of the 2017 Education Indaba and under the stewardship of the ELRC, the Post
14 Provisioning Norms (PPN) Commission was established to investigate the inadequacies of the
15 current policy and implementation thereof.

16 Legislative Framework and Guidelines

17 The work of the Commission was informed by but not limited to the following legislative
18 frameworks, guidelines and collective agreements:

- 19 • Public Service Act, 1994 (Proclamation No 103 of 1994)
- 20 • Labour Relations Act, 1995 (Act No 66 of 1995)
- 21 • Employment of Educators Act, 1998 (Act No 76 of 1998)
- 22 • ELRC Collective Agreement 4 of 2016
- 23 • Personnel Administrative Measures, 29 January 2016

24 Member Expertise and Capabilities

25 The initial task of the PPN Commission was to gain an understanding of the expertise, capabilities
26 and availability of each members. The members agreed that the group was, in fact a working group,
27 and required additional work outside the formal monthly meetings. The commission also recognized
28 the possible need to consider additional resources, expertise and availability of commission
29 members in order to meet certain objectives. **Annexure A** presents a table of the standing members
30 and the competencies of the commission members.

31 Key Activities

32 1. PPN Policy Timeline and Project Plan

33 Given the imperative to address the current PPN issues timeously, the commission developed a draft
34 timeline and identified associated tasks to finalise the new/amended PPN policy. The commission
35 proposes to work towards an operational and fully implemented policy by 2021. However, the ideal
36 date of 2021 presupposes a number of factors such as buy-in, collaborative and concerted efforts,
37 and a shared sense of urgency amongst critical stakeholders to perform the necessary activities
38 within the next four years.

39 The Commission acknowledges that there are copious number of tasks and sub-tasks, which may be
40 conducted in parallel processes. Furthermore, the Commission is cognizant of the inter-
41 dependencies from a multitude of stakeholders and is aware that impediments to any activity or
42 blockages in the system have implications to the overall plan and timeline.

43 The following bullet points highlight some key milestones for the Commission and certain
44 stakeholders:

- 45 • Conduct pilot study on PPN implementation of draft policy
- 46 • Present annual discussion documents for comment and deliberations at the ELRC Education
- 47 Indaba
- 48 • Conduct stakeholder consultations as per section 10 of NEPA
- 49 • Obtain Minister's signature on draft policy and publish for public comment
- 50 • Initiate the Socio-economic Impact Assessment System (SEIAS) process; assessment process
- 51 conducted by DPME
- 52 • Develop/update PPN software
- 53 • Develop PPN training manuals and conduct training

54 **Annexure B** presents the 'living' project plan that addresses the long-term objective of policy
55 development, yet responds to some immediate issues that may improve current implementation
56 challenges.

57 2. Proposed PPN Framework

58 In light of the issues raised regarding the existing PPN model and possible ways to address the
59 provision of school human resources, the commission facilitators developed a proposed PPN
60 framework to achieve an ideal staff establishment in light of poverty, redress and affordability
61 (**Annexure C**).

62 The Commission notes that the proposed framework is a work in progress. The intent of the
63 framework is to provide a basis on which the Commission members and other stakeholders can
64 deliberate scenarios, interrogate possibilities and engage critically about policy ideals and pragmatic
65 implementation. Figure 1 displays an overview of the essential principles related to the current and
66 envisioned PPN model and Figure 2 presents a high-level comparison of the current and proposed
67 models. In the proposed model, the notion of a post ratio (as opposed to a subject weight) allows
68 the direct calculation of the target or ideal establishment. Furthermore, the proposed model
69 accounts for management requirements, workload, or achieving an ideal LER.

ESSENTIAL PRINCIPLES OF A PPN MODEL

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Attribute	Current Model	Proposed Model
1 Determine an equitable distribution of posts across a population of schools	✓	✓
2 Easily understood by all levels of employees (Principal > District HR > Province HR)	✗	✓
3 Dependent on data that is easy to compile	✓	✓
4 Is aligned with curriculum requirements (demand)	✓	✓
5 Takes affordability into account (supply)	✓	✓
6 Should allow for an individual IDEAL school establishment to be calculated	✗	✓
5 Management posts should be awarded in ADDITION to curriculum requirements	✗	✓
6 Should explicitly demonstrate the difference between the IDEAL and the AFFORDABLE	✗	✓
7 Any two schools anywhere in the country should be able to be compared	✗	✓
8 Any two provinces should be able to be compared	✗	✓
9 Allow for education management to make decisions commensurate with poverty redress	✓	✓
10 Can be easily modified to reflect changing policy requirements and realities	✓	✓
11 The ramifications of management decisions must be predictable	✗	✓

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Figure 1. Overview of PPN model principles

HIGH LEVEL COMPARISON OF THE CURRENT AND PROPOSED MODELS

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A POST RATIO allows you to directly calculate a target or ideal establishment.

CURRENT MODEL	PROPOSED MODEL
Subject Weight	Post Ratio (LER?)
Base School Weight	N/A
Grade Weight incl LOLT	Fraction of a Post per grade (Justify? Optional?)
Learner Weight = Learners * Subject Weight	N/A
School Weight	N/A
N/A	(Ideal) Curriculum Posts = Learners / Post Ratio
N/A	(Ideal) Managing Posts is ADDED to curriculum posts
N/A	Ideal School Establishment = Curriculum + Managing
SUM(All Schools) = Province Weighted Learners	Ideal Post Establishment = Sum (All Schools)
Affordable Basket	Affordable Basket
N/A	Deficit Posts = Affordable Basket - Ideal Post Establishment
School Weight / Province Weight * 95% * Affordable Basket	Apply Deficit (surplus) to individual schools (pro rata) taking redress and other factors into account.
Redress = 5% of affordable basket distributed unevenly across quintiles	

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Figure 2. High-level comparison of the current and proposed PPN models

74 Recommendations and Way Forward

75 In the Commission's efforts to understand the political, social and economic issues, as well as the
76 intended and unintended consequences of any decisions, the Commission will engage in the
77 following activities related to the essential principles of a PPN model:

- 78 1. Determine an equitable distribution across a population of schools

- 79 2. Construct the contextual and technical aspects of the model that are ‘user friendly’ and
80 easily understood
- 81 3. Strengthen and align PED data in terms of its collection, management, use and
82 interpretation as the compilation of data will be used to inform the establishment
- 83 4. Define and address supply and demand issues, e.g.,
84 a. Demand: align PPN model to curriculum mandates
85 b. Supply: take into account affordability
- 86 5. Define and explicitly differentiate establishments that are ideal and affordable
- 87 6. Conceptualise and define, as best possible, an “ideal” school, e.g., what are the productive
88 factors of a well-managed, fully functional school that exhibits commendable learner
89 performance
- 90 a. Develop PPN calculations that supports an individual school establishment; noting that
91 an ‘ideal’ for all schools cannot be the same, e.g., rural/urban,
92 primary/secondary/curriculum offerings, as certain schools have unique requirements
- 93 b. Determine a PPN model specifically for Special Education Needs schools
- 94 c. Given the components of an ideal school, establish an acceptable working week for
95 educators and school personnel. The EEA 1998 and other frameworks, as well as an
96 understanding of what is required to support quality learning and success and
97 fulfillment of learners and educators, will guide the notion of an acceptable working
98 week.
- 99 7. Address and include management posts in addition to curriculum requirements
- 100 8. Develop a PPN model whereby calculations support an equivalent comparison of any two
101 schools nationally and indistinguishable post allocations any two provinces
- 102 9. Support education management to make decisions commensurate with poverty redress
103 whilst keeping the principles of #8
- 104 10. Develop a model that is responsive and adaptable to policy requirements and/or socio-
105 economic realities
- 106 a. Investigate various education policies, guidelines and programmes, e.g., particularly
107 those related to curriculum, that directly impact the variables of the PPN calculations;

108 Considerations for Success Factors

109 As the Commission moves forward in the policy development process, there are a number of
110 considerations that internal and external stakeholders must consider. These factors include, but are
111 not limited to the following:

- 112 • Regular consultations, e.g., legal, administrative, etc. throughout the policy development
113 process
- 114 • Development and testing of online software model as part of the policy development
115 process
- 116 • Training of officials and Senior Management PPN policy and associated software prior to
117 implementation
- 118 • Modelling of scenarios, e.g., needs, affordability, curriculum offerings, using provincial data
- 119 • During the new policy rollout and post implementation, annual M&E and refinement
120 processes are critical. The Commission believes that we must learn from previous PED
121 implementation challenges, thus monitor, and support the interpretation and application of
122 policy.

123 [END]

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124 **ANNEXURE A. PPN Commission Members and Expertise**

Sector Expertise	Organisation	Policy development process	PPN Policy	PPN Software	Weighting norms	Project Management	Presenting	Reporting
Ms Cindy Foca	ELRC	x	x		x	x	x	x
Mr Modidima Mannya	SADTU	X	X			X	x	
Mr Jones Mompoti Galorale	SADTU	X	X		X	X		
Mr Trevin Oliphant	SADTU		X		X	X		
Mr Cecil Scorgie	CTU-ATU		X		X			
Ms Theron Moodley	CTU-ATU	X	X					
Ms Etresia Raubenheimer	CTU-ATU		X		X			
Ms Leticia Munday	DBE	X	X			X		
Mr Andrew Lebepe	DBE	X	X	X	X	X		
Mr Salie Faker	DBE		X			X	X	
Mr Obed Moila	DBE		X	X	X		X	
Mr. Nyameko Tshebo	ECDoE	x	x			x		
Mr Peter Present	Deloitte		X	X	X	X	X	X
Dr Mary-Grace Villanueva	Deloitte		X		X	X	X	X

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126 ANNEXURE B. PPN COMMISSION PROJECT PLAN TO NEW POLICY IMPLEMENTATION

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128 [INSERT PROJECT PLAN]

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130 ANNEXURE C. PROPOSED PPN FRAMEWORK

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132 [INSERT PPN FRAMEWORK DECK]

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