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GOVERNMENT NOTICE

DEPARTMENT OF EDUCATION

No. 1120

23 August 2002

CALL FOR COMMENT ON THE DRAFT POST DISTRIBUTION MODEL FOR THE ALLOCATION OF EDUCATOR POSTS TO SCHOOLS

I, Kader Asmal, as Minister of Education, hereby publish the Draft Post Distribution Model For The Allocation Of Educator Posts To Schools in terms of section 5(1), read with section 35, of the Employment of Educators Act, 76 of 1998, as set out in the Schedule.

Comments from interested parties are invited, and should reach the Department not later than **30 September 2002**.

Comments should be directed to the Director-General, Private Bag X895, Pretoria, 0001, for attention: V Abhilak. Comments may also be faxed to (012) 328-7199 or sent by E-mail to abhilak.v@doe.gov.za

The name, address, telephone number and fax number of the person, governing body or organization responsible for submitting comments must also be provided.

PROFESSOR KADER ASMAL, MP
MINISTER OF EDUCATION

21 AUGUST 2002

POST DISTRIBUTION MODEL FOR THE ALLOCATION OF EDUCATOR POSTS TO SCHOOLS

PRINCIPLES ON WHICH THE MODEL IS BASED

1. The model is based on the principle that available posts are distributed among schools, proportionally to their number of weighted learners. This means that if a school has x% of the total number of weighted learners in a department, it should receive x% of the total number of available posts.
2. The concept of "weighted learner", instead of actual learner, is used to enable schools to compete on an equal footing for posts. As some learners and some learning areas require more favourable post allocations than others, each learner is given a certain weighting that reflects its relative need in respect of post provisioning. Other factors like the size of the school, the need to redistribute resources and the need to ensure equal access to the curriculum may require that additional weighted learners be allocated to some schools. A weighted learner enrollment for each school is determined, which, in relation to the total learner enrollment of the province, reflects its relative claim to the total pool of available posts in the province.

FACTORS THAT IMPACT ON THE POST PROVISIONING NEEDS OF SCHOOLS AND LEARNERS

3. Educational and administrative factors that impact differently on the post provisioning needs of learners and of schools for which specific provision is made in the model are the following:
 - The maximum ideal class size applicable to a specific learning area or phase. This ideal maximum value also takes into account complicating factors that may apply, such as additional contact time required between educator and learner and the requirement to attend to learners in more than one place at the same time. Although the situation in South Africa is such that ideal maximum class sizes cannot be complied with, these ideal values form a basis of comparison between the requirements of all the learning areas and grades.
 - Period load of educators. It is common practice that educators in the secondary school phases have a lower period load than educators in the primary school phases. This is mainly as a result of more complex time tables and subject combinations. A lower period load implies a more favourable overall learner-educator ratio. The norms in this regard that are suggested are based on average prevailing practices and do not represent workload policy.

- Need to promote a learning area. By providing a more favourable learner-educator ratio in respect of a learning area in grades 10 to 12, schools can be motivated to promote such a learning area. This should only be done in terms of national or provincial policy in this regard.
- The size of the school. The smaller a school, the more difficult it is to manage with a certain learner-educator ratio and the more favourable it should be. This matter is addressed by adding a certain constant number of weighted learners to each school. The constant additional number of weighted learners could be seen as providing for a school's principal post, or for part of it, independently from the number of learners. It could also be seen as providing for posts to deal with certain basic responsibilities that each school has, irrespective of its size.
- The number of grades. Especially in respect of smaller schools, it is more complex to manage a school with a relatively large number of grades than a similar sized school with only a few grades. This matter is addressed by linking the additional number of weighted learners, referred to under the previous point, to the number of grades. A further increase in the number of weighted learners of a combined school is required to compensate for the management complexity of such a school.
- More than one language medium of instruction. In order to deal with this complicating factor, the number of weighted learners that is granted per grade in terms of the previous point, is increased if more than one language medium of instruction is used in the particular grade. A department may set a certain minimum number or percentage of the learners in a grade that must receive tuition in a second language before recognition is given in this way.
- Disabilities of learners. These learners require additional support from various categories of personnel. Educator staff are currently being allocated to LSEN schools based on weighting norms that need to be revised in accordance with the policy as set out in the White Paper dealing with the needs of these learners. For the year 2003 a field-testing project will be conducted that will be aimed at determining norms with regard to the staffing of special and full-service schools and also incorporating schools with special/remedial/aid and/or pre-vocational classes, as well as district support teams. This project will be conducted in a number of districts where the allocation of posts will take place in accordance with the objectives of the field-testing project. In the other districts the status quo will remain for the time being. In order to manage the transformation and field testing processes, it is suggested that all posts currently allocated to LSEN schools are top-sliced from the pool of posts to be distributed by means of the post distribution model. Schools in districts where the field-testing will not take place will retain their current

establishments unless circumstances require otherwise. The top-sliced posts currently allocated to LSEN schools, as well as to other institutions or offices in the districts where the field-testing will take place, will be allocated on the basis of criteria and outcomes of the field-testing process.

- Access to the Curriculum. In order to ensure affordable and fair access of learners to the curriculum, the numbers of learners that are fully funded in respect of subjects that are more expensive to offer need to be regulated. (Certain subjects are more expensive than others because they require smaller classes and/or special equipment and facilities.) A department, therefore, may identify specific schools at which the offering of such subjects should take place as well as the maximum number of learners at such schools that should take the subjects concerned. This means that a maximum number (or percentage) of learners may be set in respect of a particular subject at a particular school. Should a school exceed such a limit, the excess learners will be funded in terms of the norms applicable to the least expensive subject. It is possible that the maximum number of learners that will be counted as taking a particular subject at a particular school may be specified as zero even though such a subject was considered for post provisioning purposes in the past. This would mean that all such learners taking such a subject would be counted as if they are taking the least expensive subject for purposes of post provisioning.

In order to assist a school to introduce such a subject, a certain minimum number of learners may be counted for post provisioning purposes during a phasing in period, even though the actual number of learners taking the subject is lower than this number. The implementation of these measures must be in accordance with a department's policy in this regard.

- Poverty. In order to compensate for the negative impact that poverty has on learning, the poverty grading of a school will also be taken into account.
- Level of funding. Policy may require that different phases be funded at different levels. Currently, all grades are set at a 100% funding level while Grade R is set at a funding level of 0%. This is merely a tool that could be used if and when required.
- Ad Hoc factors. Certain factors that are not considered above, such as an unexpected growth in learner numbers, may exist at a particular school and may justify the allocation of additional posts to such a school. These posts must be allocated from an additional pool of posts that need to be created for this purpose. This pool should preferably not exceed 1% of the total number of posts available.

WEIGHTING NORMS

4. The following norms and principles will apply in respect of all learners:

(a) Grades 1 to 9:

Based on the principle that uniform curricula apply to learners in schools in all phases up to grade 9, the following formula is used to determine the weighting of a learner:

c divided by the ideal maximum class size, divided by the average prevailing period load, multiplied by the funding level.

$$(w = c/m/l \times f)$$

The value of c is set at 40 and refers to the highest ideal maximum class size in relation to which others are expressed. The following norms currently apply but may be varied in terms of national policy:

Grade	Max Class size	Period load (%)	Funding level	Weight
	(m)	(l)	(f)	(w)
R	35	100	0	0
1 to 4	35	98	100	1,166
5 to 6	40	98	100	1,02
7	37	98	100	1,103
8 to 9	37	88	100	1,229

(b) Grades 10 to 12:

- In view of the variety of learning areas, each learner is weighted separately in terms of his or her curriculum.
- Within the limits of the maximum number of learners recognized for post provisioning purposes, a weighting (subject-learner weighting (slw)) is determined for each subject taken by a learner by means of the following formula:

c (where $c = 40$) divided by the ideal maximum class size, multiplied by the promotion factor, divided by the average period load, multiplied by the funding level, divided by 7. The following norms apply:

$$(slw = c/m \times p/l \times f/7)$$

Subject	Ideal maximum class size	Promotion factor	Period load (%)	Funding level (%)
	(m)	(p)	(l)	(f)
All agricultural subjects with a practical component (Farm Mechanics, Animal Husbandry, Field Husbandry, etc.)	16	1	84	100
All Technical subjects excluding Technical Drawing	16	1	84	100
Technical Drawing	27	1	84	100
Woodwork, Metalwork, Industrial Arts, etc.	25	1	84	100
Home Economics, Needlework and clothing	25	1	84	100
Hotel-keeping and Catering	19	1	84	100
Art (Including Design, Painting, Sculpture, etc.)	12	1	84	100
Dance (Ballet, etc.)	12	1	84	100
Music (First Instrument)	6	1	84	100
Music Performance (Second Instrument)	6	1	84	100
Speech and Drama	12	1	84	100
Biology	32	1	84	100
Physical Science	32	1	84	100
Mathematics	38	1	84	100
Computer Studies	28	1	84	100
Typing (Including Computyping)	28	1	84	100
Shorthand/Snelskrif	28	1	84	100
All other examinable subjects	38	1	84	100
Provision for non-examinable subjects	38	1	84	100

Note: The values that appear in the table as promotion factors are all set as 1. This means that no provision is made in the table for the promotion of any of these subjects. Should provision be made in policy that a certain subject should be promoted by, say 7%, the value of "1" would become "1,07". The promotion factor per subject should be included in the provincial curriculum policy and would apply equally to all learners counted in the subject.

- A total number of weighted learners is determined in respect of each examinable subject by multiplying the number of learners taking the subject (subject-learners) with the relevant subject-learner weighting (slw). If a subject has a limit in respect of the number or percentage of learners that may take such a subject, all learners exceeding this limit will be subtracted from this number of subject-learners and added to the total number of subject-learners in respect of "all other examinable subjects". If the actual number of learners taking a subject is lower than what is provided as a minimum in order to assist the school to phase in the particular subject, the provided minimum will be counted in respect of the subject concerned. The difference between the provided minimum and the actual number must be subtracted from the number of learners in respect of "all other examinable subjects". A total number of weighted learners for all the examinable subjects is then determined.

- Each learner is allowed to take 6 examinable subjects. If the total value that is obtained by multiplying the number of learners in a particular grade by the number of subjects taken by these learners exceeds 6 times the number of learners, the total weighted learners will be adjusted accordingly.
 - Provision is also made for a combination of non-examinable subjects, which, together, are given the same weighting as one "ordinary" examinable subject. A total number of non-examinable subject-learners is determined by multiplying the actual number of learners with the non-examinable slw. This is done automatically, irrespective of whether or not learners at a particular school take non-examinable subjects.
 - A total number of weighted learners is then determined by adding the total numbers of examinable and non-examinable weighted learners together.
- (c) A further distinction between schools is made based on the size of the school, the number of grades and whether or not more than one language medium of instruction is used. Provision for this is made by adding a certain number of weighted learners to a school's weighted enrollment linked to each recognized language group (maximum of 2 language groups) and each grade provided for at the school. The following values apply:
- A base number of weighted learners must be added to each school. Any value from 10 to 15, in accordance with a department's needs in this regard, will apply.
 - Additional weighted learners must be added in respect of each grade in which learners are enrolled. If learners in a particular grade are taught in more than one language medium, a further additional weighting will apply in respect of that grade. (A minimum number (or percentage) of learners in a particular grade receiving tuition in a second language may be specified before the additional provision applies. This additional weighting only applies once, irrespective of the number of additional languages that may apply):

Grades	1	2	3	4	5	6	7	8	9	10	11	12
Primary language group	2	2	2	2	2	2	2	3	3	3	3	3
Second language group	4	4	4	4	4	4	4	6	6	6	6	6

- (d) In respect of a combined school, the base number of 10 to 15 weighted learners that is granted to a school in terms of paragraph (c), is granted in respect of both the primary school phase and the secondary school phase that the school has. For this purpose the secondary school phase must include learners in any of grades 10 to 12.
5. (a) The total number of weighted learners in each school is then adjusted in terms of its poverty ranking. A provincial department must set aside 5% to 10% of its available posts for poverty redress. The higher the internal inequality in a province, the closer the goal would be to 10% while in a province with a relatively low internal inequality the goal would be closer to 5%. This goal is to be met progressively starting in the school year 2003 with a view to reaching the goal in the school year 2005. In the initial phasing in process a department may set aside 0-4% of its posts. A provincial department's plan on how to reach its target must be presented to the Department of Education and updated annually. The phasing in plan of such a norm must form part of the phasing in plan of the model as set out in paragraph 7.
- (b) The redress posts are to be distributed to schools based on the poverty of the school using the same indices as employed by the province in the National Norms and Standards for School Funding. The following distribution norms are expressed in quintile terms, but departments may use either a continuous distribution method or a quintile-based method, as long as the overall progressivity is respected.
- (c) In order to effect poverty redress in accordance with the poverty ranking of schools in terms of quintiles, the total number of weighted learners of a school in a particular quintile is multiplied by the appropriate weighting factor in the following table:

Poverty rank	% of top slice	Weight according to size of top-slice				
		0%	1%	2%	3%	4%
Q1 (poorest)	35%	1.0000	1.0150	1.0300	1.0450	1.0625
Q2	25%	1.0000	1.0100	1.0200	1.0300	1.0400
Q3	20%	1.0000	1.0075	1.0150	1.0225	1.0300
Q4	15%	1.0000	1.0050	1.0100	1.0150	1.0200
Q5 (richest)	5%	1.0000	1.0000	1.0000	1.0000	1.0000

	5%	6%	7%	8%	9%	10%
Q1	1.0775	1.0950	1.1100	1.1275	1.1450	1.1625
Q2	1.0525	1.0625	1.0750	1.0850	1.0975	1.1075
Q3	1.0400	1.0475	1.0550	1.0650	1.0725	1.0800
Q4	1.0250	1.0325	1.0375	1.0425	1.0475	1.0550
Q5	1.0000	1.0000	1.0000	1.0000	1.0000	1.0000

DISTRIBUTION FORMULA

6. After the total number of weighted learners for each school has been determined, the number of posts to be allocated to a school is determined by means of the following formula:

Posts = Total number of posts available, multiplied by weighted learners of school, divided by total weighted learners of all schools.

PHASING IN OF THE MODEL

7. The total effect that the model would have on the current post allocations to individual schools should be phased in over a reasonable period. In phasing in the effects of the model, departments should take into account all relevant factors that apply. These factors include the importance of maintaining stability in schools, the employment interests of educators and the need to provide classrooms, equipment and other facilities that schools require in terms of their curricula and their numbers of learners and posts.

STABILISING CHANGES TO SCHOOLS' ESTABLISHMENTS

8. Where a school's establishment is likely to change in any school year, the adjusted post establishment should be communicated to the school on or before 30 September preceding the school year.

Note: In order to reduce the effect of drastic fluctuations in learner numbers, a system may be used according to which the distribution of posts is based on the weighted enrollments of schools over more than one year. This can be achieved by adjusting the actual weighted enrollment of a school by also using learner numbers of the previous year(s). The following system could be considered:

For purposes of determining a school's post establishment for year n , the total weighted enrollment in terms of year $n - 1$ (we_{n-1}) is determined after which it is adjusted (awe) as follows:

$$awe = [3 \times (E_{n-1}) + 2 \times (E_{n-2}) + (E_{n-3})]/6, \text{ where } E_n = \text{Enrollment for year } n.$$

ROLE OF THE NATIONAL DEPARTMENT OF EDUCATION (DOE)

9. Provincial departments are required to adhere to the intent and spirit of these norms. Where a province deviates from any of these norms it needs to justify such deviation to the DOE. The DOE may require information from time to time from provinces in order to ensure that these norms are being implemented. Provinces are thus required to comply with these requests.