Prof J.P. de Lange
Chairman of the Main Committee
HSRC Investigation into Education

REPORT OF THE WORK COMMITTEE: EDUCATION MANAGEMENT

As Chairman I take pleasure in submitting the report of the Work Committee: Education Management to the Main Committee for consideration. The final chapter contains a summary of the report.

KBHartshorne

DR K.B. HARTSHORNE
CHAIRMAN

STATEMENT

This report has been prepared by the Work Committee: Education management instituted by the HSRC Main Committee for the Investigation into Education.

This report reflects the findings, opinions and recommendations of the Work Committee: Education management and, where applicable, those of groups or individuals in the work committee with regard to matters about which there are differences of opinion. The findings, opinions and recommendations contained in this report do not necessarily reflect the point of view of either the HSRC or the HSRC Main Committee for the Investigation into Education.

This report is regarded by the HSRC Main Committee for the Investigation into Education as a submission of the Work Committee: Education management to the Main Committee. The point of view and recommendations of the HSRC Main Committee will be contained in its final report that will be submitted to the Cabinet.

Human Sciences Research Council

Investigation into Education

Report of the Work Committee:
Education management

PRETORIA
JULY 1981

C O N T E N T S

ORIENTATION

THE REQUEST

In June 1980 the Cabinet requested the Human Sciences Research Council to con-
duct an in-depth investigation into all facets of education in the RSA. The
request to the HSRC read as follows:

*Your Council, in co-operation with all interested parties, must conduct a
scientific and co-ordinated investigation and within 12 months make recommen-
dations to the Cabinet on:*

(a)   guiding principles for a feasible education policy in the RSA in order to

   (i)   allow for the realization of the inhabitants' potential,
   (ii)   promote economic growth in the RSA, and
   (iii)   improve the quality of life of all the inhabitants of the country

(b)   the organization and control structure and financing of education

(c)   machinery for consultation and decision-making in education

*(d)   an education infrastructure to provide for the manpower requirements of
the RSA and the self-realization of its inhabitants, and*

*(e)   a programme for making available education of the same quality for all
population groups.*

*The investigation must be conducted in the light of, among other things, the
present educational situation, the population composition in South African so-
ciety and the means that can be made available for education in the national
economy. The investigation must cover all levels of education, i.e. pre-primary,
primary, secondary and tertiary.*

In accordance with the South African Plan for Research into the Human Sciences,
the following plan of action was decided on:

(a)   Prof. J.P. de Lange, Rector of the Rand Afrikaans University would be
appeared as research leader.

b)   After the necessary consultation a high-level co-ordinating committee
      would be appointed to guide and co-ordinate the Investigation and
      guarantee its scientific character. Members of the committee would in-
      clude representatives of interested government departments, the private
      sector as well as eminent scientists from all the disciplines able to
      make a contribution to the development of education.

c)   Representatives of education institutions would be invited to serve on
      the subcommittees and work groups of the Investigation.

d)   All population groups would be involved in the co-ordinated conduct of
      the Investigation.

e)   The Investigation would be conducted in a spirit of positive co-ordina-
      tion, i.e. the available research manpower both within and outside the
      HSRC and all research activities which had either already been concluded
      or were still going on would be included in the Investigation on a basis
      of voluntary co-operation.

f)   The HSRC would undertake parts of the Investigation itself, but would in
      the main part make its research structure available to contract research-
      ers for the Investigation.

g)   Priority would be given to the most pressing problem areas so that the
      Investigation could be expedited and interim reports submitted to the
      Cabinet in good time.

h)   Where applicable, alternative solutions for problems in education would
      be submitted.

HE MAIN COMMITTEE

ıe Main Committee of the Investigation into Education, whose members were
ɔpointed in their personal capacity by the Council of the HSRC, was as follows:

ˈof. J.P. de Lange (Chairman)	Rector, Rand Afrikaans University
ˈof. A.N. Boyce	Rector, Johannesburg College of Education
˄ S.S. Brand	Chief,Financial Policy, Dept. of Finance
˄ R.R.M. Cingo	Inspector of Schools: Kroonstad East circuit, Dept. of Education and Training

Dr J.G. Garbers	President, Human Sciences Research Council
Mr J.B. Haasbroek	Director, South African Institute for Educational Research, HSRC
Dr K.B. Hartshorne	Centre of Continuing Education, University of the Witwatersrand
Prof. J.H. Jooste	Director, Transvaal Education Department
Prof. S.R. Maharaj	Dean, Faculty of Education, University of Durban-Westville
Dr P.R.T. Nel	Former Director of Education: Natal Dept. of Education and Dept. of Indian Education
Prof. A.C. Nkabinde	Principal, University of Zululand
Mr R.D. Nobin	Inspector of Education: Dept. of Internal Affairs
Mr M.C. O'Dowd	Anglo American Corporation of SA Ltd
Mr A. Pittendrigh	Director, Natal Technikon
Miss C.C. Regnart	Westerford High School
Dr P. Smit	Vice-President, Human Sciences Research Council
Mr F.A. Sonn	Director, Peninsula Technikon and President, Union of Teachers' Associations of SA
Mr J.F. Steyn	Hoofsekretaris, Tvl. Onderwysersvereniging and Secretary, Federal Council of Teachers' Associations in SA
Prof. N.J. Swart	Vice-Rector, Potchefstroom University for Christian Higher Education
Mr L.M. Taunyane	President, Transvaal United African Teachers' Association
Dr P.J. van der Merwe	Deputy Director-General, Department for Manpower
Prof. R.E. van der Ross	Principal, University of the Western Cape
Prof. F. van der Stoep	Dean, Faculty of Education, University of Pretoria
Prof. N.T. van Loggerenberg	Dean, Faculty of Education, University of OFS and Chairman, South African Teachers' Council for Whites
Dr R.H. Venter	Director, University Affairs, Dept. of National Education
Prof W.B. Vosloo	Head, Dept. of Political Science and Public Administration, University of Stellenbosch

After the Investigation had been in progress for some months, a request was received from the Department of National Education of South West Africa that it be granted observer status on the Main Committee; this was approved. From the fifth meeting of the Main Committee, Mr J.A. de Jager, Secretary of the Department, therefore also attended meetings of the Main Committee.

At the beginning of the Investigation Dr S.W.H. Engelbrecht was appointed secretary and Dr F.P. Groenewald co-ordinator of the Investigation. In due course the secretariat was expanded with the appointment of Dr D.J. van den Berg, after which the above-mentioned three persons acted as secretary co-ordinators.

Mr C.P. Serfontein was later appointed co-ordinator. During the last phase of the Investigation the secretariat was further expanded when Prof. J. McG. Niven of the University of Natal was seconded to the HSRC for three months, from February to May 1981. The administrative staff consisted of Mrs I.S. Samuel, Mrs A. van der Lingen, Miss J.M.M. Botha, Mrs S. van der Walt and other temporary staff.

OPERATIONALIZATION OF THE RESEARCH REQUEST

The operationalization of the research request resulted in the establishment of 18 work committees each being responsible for a different aspect of education. Although all the work committees were not identified at the first meeting, the following work committees were eventually established. (For each work committee the name of the chairman is given, who in all cases had to be a member of the Main Committee. The chairman of the Main Committee was ex officio member of all the work committees.)

Educational principles and policy	Prof. F. van der Stoep
Education management	Dr K.B. Hartshorne
Education financing	Dr S.S. Brand
Education system planning	Mr J.B. Haasbroek
Curriculum development	Prof. F. van der Stoep
Guidance	Miss C.C. Regnart
Education for children with special educational needs	Dr J.G. Garbers
Building services	Mr F.A. Sonn
Health, medical and paramedical services	Mr R.D. Nobin
Demography, Education and Manpower	Dr P.J. van der Merwe
Teaching of the Natural Sciences, Mathematics and technical subjects	Mr J.B. Haasbroek
Recruitment and training of teachers	Prof. N.T. van Loggerenberg
Innovation strategies in education	Prof. W.B. Vosloo
A programme for education of equal quality	Prof. R.E. van der Ross
Legal matters	Mr M.C. O'Dowd
Educational technology	Mr A. Pittendrigh
Languages and language instruction	Dr P.R.T. Nel
Education bibliography	

Only in the case of the last work committee was a chairman not appointed from the Main Committee. Miss H.J. Otto of the HSRC Library compiled the bibliography for each of the work committees.

During the last stages of the Investigation a Synthesis Committee was appointed to consolidate especially the work of three work committees, namely Education management, Education system planning and Education financing. The chairman of the Main Committee of the Investigation into Education was appointed chairman of the Synthesis Committee.

COMPOSITION OF THE WORK COMMITTEE: EDUCATION MANAGEMENT

CHAIRMAN	:	Dr K.B. Hartshorne (member of Main Committee)
MEMBERS	:	Prof. M.J. Ashley, University of Cape Town
		Mr C.D. Beukes, Department of Internal Affairs
		Mr O.D. Dhlomo, Minister of Education, KwaZulu
		Prof. J.H. Jooste (member of Main Committee)
		Dr. R.H. Lee, the Urban Foundation
		Mr C.A. Naguran, Department of Internal Affairs
		Dr I.M. Rautenbach, Office of the Prime Minister
		Mr I. Robson, Commission for Administration
		Mr F.A. Sonn (member of Main Committee)
		Mr J.F. Steyn (member of Main Committee)
		Prof. N.J. Swart (member of Main Committee)
		Mr L.M. Taunyane (member of Main Committee)
		Prof. N.T. van Loggerenberg (member of Main Committee)
		Prof. W.B. Vosloo (member of Main Committee)
SECRETARY -CO-ORDINATOR	:	Dr. F.P Groenewald (HSRC)

MEETINGS

Meetings of the full work committee were held on

19 September 1980
17 October 1980
17 November 1980
22 January 1981
27 February 1981
16 March 1981
2 - 3 April 1981
10 April 1981

A subcommittee, consisting of the chairman and Profs Swart and Vosloo, was appointed to supervise the research projects commissioned by the HSRC at the request of the work committee, and held discussions with the researchers on

3 December 1980
5 February 1981

A second subcommittee, consisting of the chairman, Messrs Beukes, Naguran, Robson, Tuanyane and Prof. Vosloo, was appointed to work on the final drafts of the report of the work committee, and met on

26 February 1981
6 March 1981
17 March 1981
1 April 1981

Responsibility for the writing of the report was undertaken by the chairman.

DOCUMENTATION AVAILABLE TO THE WORK COMMITTEE

the work committee had available to it

- a literature study on education management undertaken by Miss H.J. Otto of the HSRC library;

- the proceedings of the Main Committee and other work committees of the HSRC Investigation;

- research reports undertaken on behalf of other work committees;

- a report on a visit to Port Elizabeth, Cape Town and Bloemfontein under- taken by the chairman and three members of the Main Committee;

- a mass of memoranda submitted by a wide variety of bodies in South Africa, and

- itself commissioned four research reports.

For convenience the major research sources emanating from the HSRC Investigation that had reference to education management are now listed.

Those marked with an asterisk (*) are those specifically commissioned by the Work Committee: Education management.

L.R. Kluever : Voorlopige Analitiese Raamwerk van Aspekte
van die Onderwysstelsel en van Belanghebben-
de Amptelike Instansies: RGN (OO), January 1981

*F.F. Buckland and : An Analysis of the Current Situation regar-
O.C. van den Berg ding Education Management in the Republic
of South Africa with special reference to the
Pre-Tertiary level: HSRC (IE), February 1981

H.J.S. Stone : Die Administratiewe Prosesse van die Onder-
wysstelsel met verwysing na 'n Nuwe Onderwys-
bedeling vir die RSA: RGN (OO), February 1981

C.R. Liebenberg, : Ondersoek na die Suid-Afrikaanse Onderwys-
H.C.A. Venter and stelsel: RGN, SAION, 1980
C. van Niekerk

* J.B.Z. Louw : Onderwysbestuur op Na-Sekondêre vlak in Suid-
Afrika: RGN (OO), February 1981 (a)

J.B.Z. Louw : Die Suid-Afrikaanse Onderwysstelsel: Gesigs-
punte oor die Rasionalisasie van Onderwysstruk-
ture op die Tersiêre vlak, Julie 1980

J.B.Z. Louw : 'n Stelsel vir Na-Sekondêre Onderwys in Suid-
Afrika, Maart 1981 (b)

*M.B. Steinberg : A comparative Study of selected National Educa-
tion systems, with special reference to Ad-
ministration and Control: HSRC (IE), February
1981

*J. v.d. Merwe : Onderwysbestuur in Kanada, Switserland, Frank-
ryk, Nigerië, Nieu-Seeland en Nederland - On-
derwysvernuwing: RGN (OO), February 1981

B.A.J. van Rensburg : Open and Closed systems of Education: HSRC
(IE), January 1981.

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CHAPTER 1

GENERAL CONSIDERATIONS

1.1   INTRODUCTION

1.1.1   Education Management as defined by the work committee for the practical
        purposes of this investigation:

(i)   With the setting up by the Main Committee of eighteen work committees it
        was also necessary that there should be some defining of 'boundaries'
        within which each work committee should operate. The initial area of
        operation for the Work Committee : Education management was defined as:
        decision-making, control, administration, organisation, co-ordination
        and consultation, with the added proviso that these were to be consi-
        dered at the broad, macro-level of management. From the first it was
        clear that no work committee could work in isolation and that much syn-
        thesising and reconciliation of the outcomes of the various committees
        would be necessary at a later stage. It was clear also that while the
        interrelationships among committees ran through the whole Investigation,
        the Work Committee: Education management had particular ties with the
        committees concerned with principles, systems planning and finance.

(ii)   At the first meeting of the work committee on 19 September 1980 it was
        decided (and subsequently approved by the Main Committee) that *the pro-
        vision and flow of information* and *macro-planning* should be added to
        its concerns, and that the components making up its terms of reference
        should be consolidated as follows:

        (a)   decision-making and consultation;
        (b)   control and co-ordination;
        (c)   organisation and administration;
        (d)   information flow and macro-planning.

        The order is of significance as it indicates the thinking of the work
        committee in regard to priorities, with (c) being regarded as the par-
        ticular link with and flow through to the Work Committee: Education
        system planning. Component (d) was regarded not as standing on its own
        but as an essential ingredient of the other three.

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iii) Subsequent to this meeting a document entitled *Provisional Operational-ization of some of the Themes relevant to the Investigation into Education* was circulated by the Main Committee to a number of bodies includ-ing education departments, advisory bodies, the SA Teachers' Council for Whites, teachers' associations and universities (in particular faculties and departments of education and of public administration). Much of the comment submitted had to do with conflicting theoretical approaches to the concepts 'management' and 'administration' and the relationship be-tween them, issues which were also discussed within the work committee itself.

iv) For the purposes of this investigation it was decided that in the main the work committee was concerned with 'management' as the philosophy and practice of decision-making, with all the influences brought to bear upon this process by

(a) 'participatory' consultative and negotiating procedures;

(b) the relevance and effectiveness of the information and plans avail-able to the decision-making bodies.

Its subsidiary concern was control and co-ordination, in which some at-tention would be paid to organisational matters, although these clearly were more the concern of the Work Committee: Education system planning. Within this management concept, structures, processes, channels of com-munication and the 'actors' involved were all of importance, both in analysing and evaluating the present situations as well as for renewal and reconstruction in terms of a new dispensation.

Because of the way in which the themes identified by the Main Committee were 'operationalised' it is equally important to note that the follow-ing were not among the main concerns of the work committee: financing and resource allocation, personnel management and the details of orga-nisation and systems planning. Both its terms of reference and the time at its disposal constrained the committee to report in broad, macro-terms.

(Stone,1981, Section A, pp. 1 - 9; Louw, 1981(a), pp. 1 - 2; Steinberg, 1981, p. 1; Buckland, 1981, pp. 3-4).

1.1.2 Statement of problem

(i)   In opening the first meeting of the Main Committee of the investiga-
        tion on 25 August 1980, the President of the Human Sciences Research
        Council, Dr J.G. Garbers, had this to say:

*"Education is very closely linked to values, whether cultural, ideologi-
cal or political. Such values are quite frequently exclusive in nature,
and in a scientific investigation should themselves be the object of
scientific study. These factual values cannot be ignored and ways and
means will have to be found to accommodate them."*

Education moreover, does not exist in a vacuum but in a certain consti-
tutional, political, social and economic 'surround' or context. The
area of education management, as defined, because it is concerned with
decision-making primarily, the ways in which decisions are reached
('participatory consultation and negotiation') and the ways in which
they are implemented ('control and co-ordination') is a particularly
sensitive area because it is closest to the body politic. There is no
escaping the fact that education, because it is concerned, or should be,
with teaching individuals to think, with knowledge, attitudes and skills
(personal, social and practical), is inevitably one of the most politi-
cal activities of the human being.

(ii)   In the South African situation the issue is more complex than in most
        countries because in this key area of decision-making the great majority
        of our people have had no 'say' or major influence on the educational
        policy decisions taken on their behalf by a political structure in which
        they have no power/authority base from which to operate. One of the
        major reasons for the present investigation coming into being has been
        the response by that particular structure to very specific and concrete
        grievances emanating from communities which regarded their education as
        inferior and 'disadvantaged', and which were faced with rejection by
        their young people of the very authority responsible for this education.

(iii)   Using a slightly different perspective the Urban Foundation, in its main
        memorandum to the Main Committee, had this to say:

*"The RSA should be seen as a developing society. In common with other
societies which have reached a similar stage of economic development,*

*it is characterised by grave inequalities. It is widely agreed that
the area comprises a single economy. At the same time, it is obvious
that development has been rapid only in a limited sector: the majority of
the population and country remain in conditions of underdevelopment.
The areas of underdevelopment coincide largely with the ethnic divisions
of the country, and perception of this heightens the sense of 'relative
deprivation' which is an important element in the dissatisfaction with
the present education system. Lack of balanced development, therefore,
with its individual and social consequences, lies at the root of the
alienation of individuals from 'the system' and the periodic social
crises (manpower needs, schools boycotts, rural development needs) that
are perceived within the society.*

*The problems and challenges facing education in South Africa today are
therefore of two kinds:*

*First, there are the problems and challenges outlined above. These
exist - or at least originate - outside the education system itself.
They arise from various demographic, social, political and economic cir-
cumstances, and subsequently come to bear directly upon the education
system. In South Africa, some of these 'external' factors do arise from
the unique plural nature of its society and its history. On the other
hand, it must be stressed that many other factors are common to educa-
tion in other countries. The degree to which education generates high
expectations in the population, and its capacity to meet these expecta-
tions is largely determined by these 'external circumstances'. The most
obvious of these is usually the political decision regarding the propor-
tion of national resources allocated to education.*

*Secondly, are the problems and challenges that arise within the educa=
tion system itself and which render it internally 'effective' and 'effi-
cient' to a greater or lesser degree. Included here would be bureau-
cratic issues, provision of support services and the recruitment, train-
ing and retention of teachers."*

(iv)   In connection with the second group of problems it is important to note
that grave dissatisfaction throughout the teaching profession, resulting
from the inadequacy of consultative and negotiating machinery through
which the profession could influence decisions affecting its nature,
status and future, was also among the major reasons for the institution

of the present investigation.

(v)   The first group of problems and challenges are highly relevant to a consideration of education management, which is concerned with such matters as decision-making, consultation, control and co-ordination. Clearly a new dispensation in education cannot stand in isolation; it cannot come about independently of marked social, political and constitutional change. Yet this does not mean that in considering education management one must be content with internal structural changes within a status quo context. Education as a process has creative as well as conserving qualities, and it has a primary role in supporting wider change in society; it can anticipate and facilitate change. It is from this standpoint that the Work Committee: Education management has approached its task; moving from a realistic assessment of the present, it has attempted to propose management structures and processes that will enable the principles adopted by the Main Committee to be applied increasingly in the future. It has not been constrained by the status quo, but equally it is fully aware that much of what it proposes cannot fully be realised independently of social and constitutional change.

(vi)   Yet it was important that what it proposed should also in the short term have acceptance and legitimacy across as wide a spectrum as possible. Therefore it sought the strongest base possible for real participation, consultation and negotiation among representatives of all the people of South Africa in decision-making on broad education policy and the allocation of resources. The achievement of this common base from which to undertake further development and reconstruction is fundamental if practical content is to be given to the concepts of equal opportunity and equal quality and standards.

(vii)   The further task of the work committee was to suggest structures and processes that would allow flexibility, diversity and educationally relevant differentiation within such a broad, unified common approach to the management of education. In particular this had to do with the fundamental principle of freedom of choice - of the individual, of parents and of organisations within society. This, in practice, led to the work committee giving considerable attention to the complementary functioning of centralisation and decentralisation not as necessarily opposing forces but as a continuum of processes leading from the individual school or institution through to the highest levels of centralised education

policy and decision-making. Arising from this the three-level model was developed in further detail and it is in this context that the committee's proposals are presented.

1.1.3   Working methods of the committee

1.1.3.1 Collection of information

In the early stages of the work of the committee the information available to it was largely descriptive of the present systems of education in South Africa. Much of this is in published form and is to be found in standard works such as those of Malherbe, Behr and Macmillan, and Ruperti to name but a few, and in the official annual reports of the various education departments.

Added to this was a mass of comment, critical and otherwise, emanating from the following sources:

a seminar held by the HSRC prior to the first meeting of the Main Committee, during which problem areas were identified and discussed;

submissions from a large number of bodies, such as universities and teachers' organisations, which were also asked by the HSRC to identify and comment on problem areas ('knelpunte') in education in South Africa;

responses from a very wide cross-section of public bodies asked to comment on the first draft of the Principles of Education in the RSA, in which most submissions went beyond the principles to discussions of their application;

a more limited number of documents, from bodies such as teachers' associations and education departments for example, that address themselves to more specific issues within the general area of education management.

The work committee then commissioned research reports in two major areas - education management in South Africa and in overseas countries. The brief to the researchers indicated that:

the research should be geared to the specific concerns of the work committee, i.e. decision-making, consultation, etc. as outlined in para-

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graph 1.1.1(iv).

the research should be critical and analytic, not descriptive, and where possible should hihglight problem areas.

It is also important to note that from 3 December 1980, when the projects were first discussed with the researchers, they had only until 15 February 1981 to complete their work. The severe constraints of time must be taken into account in any consideration of the research reports, and the work committee owes the researchers a deep debt of gratitude for what they were able to accomplish in this extremely limited time at a most inconvenient period of the year.

A small subcommittee discussed the draft reports with the researchers on 5 February 1981 and the final reports were considered by the work committee on 26 February and 6 March. Together with the report by Stone, commissioned by the Work Committee: Education system planning, they form the major background to the submission of the work committee to the Main Committee.

1.1.3.2 <u>Statement of objectives</u> (see 1.3)

The work committee itself devoted considerable time at a number of meetings to establishing as clear a statement as possible of'the objectives to be achieved by the management structures and processes in a reconstructed education system. In this it was guided by the principles approved by the Main Committee as the main determinants. The final statement as presented in paragraph 1.3 is a refinement of two drafts on objectives prepared by the chairman of the work committee, together with input from drafts on evaluation criteria prepared by Prof. W.B. Vosloo,

1.1.3.3 <u>Statement of evaluation criteria</u> (see paragraphs 1.3 and 1.4)

Because of the highly sensitive nature of the task assigned to the work committee (as described in Statement of problem, 1.1.2) and the widely differing theoretical and other less defensible assumptions underlying the mass of material it had to cope with, it was clear from the outset that the committee would need tools with which to evaluate this material. In all, three drafts of evaluation criteria prepared by Prof. Vosloo were considered by the work committee. Essentially they were two-fold in nature:

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basic criteria, directly derived from the principles established by the
Main Committee:

instrumental criteria, derived from general management considerations
and concerned with matters such as efficiency and, more important, ef-
fectiveness (in achieving stated goals and objectives).

Paragraph 1.4 - categories of analysis - is a further refinement and ex-
plication of this part of the committee's work, as an essential 'lead-
in' to its proposals and recommendations to the Main Committee.

1.1.3.4 Mode of working of the committee

The committee was composed in such a way that just over half of its mem-
bers were from the Main Committee while the remainder were appointed in
order to provide a balance of experience and expertise in the committee
as a whole: the addition of members from outside the professional field
of education proved to be particularly valuable. It was therefore a
body representative of a wide spectrum of expertise, background and out-
look.

Throughout, it operated on a basis of discussion and reasoned argument,
more in the nature of a seminar or workshop rather than of a formal com-
mittee, with various members making written contributions from time to
time. Its discussions, however, were structured in such a way that
there was a logical progression from

the initial refinement of the terms of reference and defining of educa-
tion management for the practical purposes of the committee (see para-
graph 1.1.1); to - the collection and study of background information
supplemented by specifically commissioned research reports (see para-
graph 1.1.3.1); to - the establishing of criteria with which to evaluate
this material (see paragraph 1.4); to - the postulation of objectives de-
rived from the principles established as guidelines for the whole in-
vestigation (see paragraph 1.3); to - the most difficult area of all -
proposals and recommendations for the future management of the provision
of education in South Africa (see chapter 2).

In this last area, particularly, there were differences of approach and
emphasis among members of the committee. In some cases these have been

discussed in the 'preliminary observations' or 'introductory notes' to
the proposals and recommendations. Further, although this report has
developed what might be called *preferred models* for management, there is
also consideration and discussion of various options. Perhaps most im-
portant of all there is a discussion of possible immediate action and
transitional arrangements in paragraph 2.4.

In the end, because the committee did not operate under a system of vo-
ting procedures but of free exchange of ideas, the chairman accepted re-
sponsibility for attempting to express *the general mind* of the committee.
It is clear, therefore, that not everyone on the committee wil give un-
reserved agreement to everything in this report. However, there is
agreement that the report raises the critical issues, pinpoints the fun-
damental areas of concern, and provides the Main Committee with concrete
proposals in the field of education management to which it should give
serious consideration in deciding on its final proposals to the Cabinet.

Finally, the chairman of the work committee deeply appreciates the ob-
jective and co-operative manner in which the whole committee approached
its task. It was a demanding exercise, which could not have been car-
ried through without everyone on the committee addressing all his ta-
lents and judgement to the challenges it presented. A very sincere ex-
pression of thanks must therefore go to everyone on the committee, to
those who served additionally on subcommittees, to the researchers, to
the secretariat and in particular to Dr F.P. Groenewald of the HSRC.

1.2   FINDINGS OF RESEARCH

1.2.1   International studies

At the request of the work committee, literature studies were undertaken
of the education management systems in 15 countries. These were carried
out by Prof. M. Steinberg (University of Cape Town) and Prof. J. van der
Merwe (University of the OFS). Each writer also provided a summary of
general points emerging from the studies, and some observations on the
application of these to South Africa. The summary which follows draws
from both studies, as the conclusions reached independently by the re-
searchers are quite compatible.

Both researchers caution against unconsidered use of research of this

kind. V.d. Merwe (1981, p. 1) indicates that the structures of educa-
tion management are often clearly described in broad terms, but that de-
tail is lacking, and it is difficult to understand the precise nature
of the processes taking place (compare observations by Buckland and V.d.
Berg, paragraph 1.2.2.1 below). Steinberg (1981) makes the same point
more widely when he writes: *National systems of education are thus in-
herently organismic in character. Administrative structures and poli-
cies are inevitably influenced by ongoing change in all other facets of
the wider structures of state and society.* (p. 7) Following these ob-
servations, the committee has been cautious in simply applying interna-
tional descriptive literature to the South African situation; however,
the following general points have formed an important background to its
consideration of the structure and processes of education management in
South Africa.

(i)   The ultimate purpose of the structures and processes of education man-
        agement is to bring pupils/students and teachers together in conditions
        which will promote learning. Administration, management and innovation
        strategies are important in so far as they achieve that end.

(ii)   On the other hand, it is an agreed fact that systems of education man-
        agement are not, in reality, determined purely for the purpose of pro-
        moting good classroom conditions. A writer quoted by Steinberg (1981)
        observes: *"... the things outside the schools matter even more than the
        things inside the schools, and govern and interpret the things inside".*
        As a result, both researchers point conclusively to the interaction of
        education and the wider society, and the impossibility of planning and
        managing educational development in isolation from changes in the so-
        ciety as a whole. This point is taken up in the treatment of innovation
        below.

(iii)   Some distinctively modern international trends (that are also clearly
        discernible in South Africa) are specified by Steinberg (1981) in his
        introduction. He identifies four such trends:

        (a) the increasingly important role of education planning;

        (b) the increasingly important *economic* view of education, seeing it as
             an investment for the future of the country;

        (c) rapid innovation and discarding of traditions in the face of major

social changes;

(d) the influence of international agencies (pp. 1 - 7).

However, these remain trends; both researchers agree, and the indi-
vidual studies confirm, that the education systems of most coun-
tries reflect the interests of the dominant group(s) and/or polit-
ical structure(s).

(iv) In the studies of individual countries the following points of interest
emerge:

(a) Highly centralised education systems are encountered either in
countries with homogeneous populations (e.g. France) or in those
with a single party state and powerful ideology (e.g. Mozambique,
the USSR). Conversely, decentralised systems are encountered in
countries with a long tradition of democratic government (e.g.
England) or in countries with multi-cultural or plural populations
(e.g. Switzerland). Pressures for decentralisation on other
grounds (e.g. differentiated needs) are beginning to be seen in so-
phisticated populations (e.g. Australian Commonwealth Territory,
New Zealand).

(b) Different methods of defining central and local functions are fol-
lowed. In Israel, the functions of the central authority are de-
fined (Steinberg, 1981, p. 24) while in Canada those of local auth-
orities are specified and any unspecified powers are assumed to be
the responsibility of the federal authority (V.d. Merwe, 1981, p.1).
V.d. Merwe (1981), especially, treats in some depth the issue of
centralisation and decentralisation, as follows:

*"(a) By multikulturele samelewings is daar 'n neiging tot groot seg-
genskap aan verkose liggame (beheerrade?) wat direk verant-
woordelik is vir die algemene bestuur van 'n skool.*

*(b) Beheerrade kry verteenwoordiging op streeksrade. Die grense
van streke kan verskil vir die verskillende bevolkingsgroepe.*

*(c) Waar beheerrade en streeksrade grootliks te doen het met toe-
sig oor kulturele vorming en die algemene aard van die inhoud
van die opvoedingsproses, is die sentrale owerheid (regering)
verantwoordelik vir gelyke toedeling van fondse, die vaslê van*

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en toesig oor handhawing van standaarde en die verskaffing
van basiese dienste vir al die bevolkingsgroepe.

(d) Plaaslike gemeenskappe wat voel dat hulle nie die kundigheid
het om deur middel van verkose beheerrade en streeksrade te
werk nie, het die reg om die sentrale owerheid te versoek om
sodanige rade te benoem op grond van die kundigheid van die
benoemdes en hul insig in die probleme van die betrokke ge=
meenskap.

(e) Verteenwoordigers van al die streeksrade (afsonderlik en ge-
samentlik vir al die bevolkingsgroepe) dien saam met verteen-
woordigers van ander belanghebbendes soos onderwysers en werk-
gewers op koördinerende of adviesliggame.

(f) Daar moet 'n effektiewe inligtingsvloei wees vanaf die koördi-
nerende of adviesliggame na 'n permanente statutêre onderwys-
beplanningsliggaam, waarop die onderwysdepartemente vir die
verskillende bevolkingsgroepe verteenwoordiging het.

(g) Omdat mannekragontwikkeling grootliks die verantwoordelikheid
van die regering is, kan onderwysbestuur in twee fases verdeel
word. Tot aan die einde van die skoolpligtige fase kan dit
bestuur word soos hierbo. Op die na-skoolpligtige fase kan
sentrale regering groter inspraak kry, deurdat beheerrade en
streeksrade anders saamgestel word." (pp.5 - 6).

(c) Educational policy in multi-cultural societies takes many forms,
and no general rule can be deduced. Steinberg (1981, p. 7) quotes
a useful typology.

(d) V.d. Merwe's (1981) analysis of the Netherlands is interesting in
the light of his assertion that it is *h goeie voorbeeld van 'n land*
waar erkenning gegee word aan sowel gemeenskaplikheid as diversi-
teit. (pp. 49 - 51).

Both researchers devote considerable attention to innovation. In both
cases the potential conflicts in the process of innovation are noted;
and both researchers agree that an *innovation strategy* is an essential
component of any education planning and thus, in turn, of education
management, both structure and process. In this context, both research-

ers stress the need for what V.d. Merwe (1981) calls *the active involvement of the user* (p. 55).

In accordance with this finding, and in the light of Principle 11, the work committee gives great weight later to the role of the Council for Educational Research and Development, as the source of planned, ongoing innovation in the education system.

(vi) Summary

From the survey of education management in other countries the following points therefore emerge:

(a) the ultimate purpose of education management is better learning and teaching;

(b) systems of education are, however, part of the political, social and economic structure of the country and have to be planned and managed in that context. Acceptability and involvement of the *user* is thus essential;

(c) the rights and functions of each level of management must be clearly defined if decentralisation is to work effectively;

(d) South Africa has both a multi-cultural population, and a need for differentiated educational options to meet the needs of sophisticated *users* and an increasingly sophisticated economy. For both reasons, a high degree of decentralisation is indicated;

(e) in a decentralised system, there is a strong need for a firm national policy - especially as regards innovation - and active link·· ing and co-ordinating bodies, with cross-representation of membership;

(f) an innovation strategy, and the structures and processes to carry it out, is an essential element of the management of education.

1.2.2 Studies of the South African situation

The work committee commissioned two studies of the South African situation. F.P. Buckland and O.C. van den Berg (UCT) analysed the current situation regarding education management with special reference to the pre-tertiary level. Dr J.B.Z. Louw (CUP) dealt with education management at the post-secondary level. In this case - unlike the interna-

tional research - it is necessary to treat separately general points arising from the two research reports. In summary, relevant findings from both reports are brought together.

1.2.2.1 Pre-tertiary level

Buckland and V.d. Berg assume a knowledge among members of the work committee of the structures of the present system of education management. Their report, therefore, concentrates on an analysis of the structure as it operates in practice.

Two essential theoretical points are made which establish the form of the report:

(i)   The description of the formal structures of education management is misleading and idealistic (cf. both V.d. Merwe and Steinberg), unless accompanied by an attempt to describe the process that occurs in real life within those structures. Thus, all analysis within this report concerns itself with both structure and process.

(ii)   Management is essentially concerned with decision-making. Administration is concerned with the interpretation and implementation of decisions. In turn, decision-making is entirely dependent on information. The quality of the decision is directly related to the quality of the information on which it is based. Accordingly analysis of education management can legitimately focus on the levels at which decisions are made (defined by the authors as the *control system*) and the structures and processes through which information reaches decision-makers at various levels.

The analysis of the present system in these terms is intricate, but, for summary purposes, leads to the following conclusions (Buckland and Van den Berg, 1981, pp. 48 - 54):

(a)   *"The education crisis in South Africa is essentially a crisis of legitimacy" (p. 54). Legitimacy is related to two factors: the acceptance by the* user *of the authority which establishes the education system as such; and the involvement of the* user *in the decision-making process within the education system itself. In neither case, is the present situation satisfactory.*

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(b) *"Education is <u>controlled</u> by a cumbersome and extremely complex bu-reaucratic structure"* (p. 48).

(c) *"There exists no body specifically established to effect co-ordination at the national level"* (p. 49).

(d) *"There exists no unit within the entire education system which is responsible for on-going planning at the policy-making level"* (p. 49).

(e) *"The ideologies of certain sectors of the community may be dispro-portionately represented in research"* (pp. 49/50).

(f) *Many consultative bodies exist within subsystems of the whole education system. However, there are inadequate consultative bodies operating across the system as a whole* (pp.50/51).

(g) *The process by which the <u>user</u> is involved is neither adequate nor accepted. The "crisis of legitimacy" arises from this fact* (pp. 51/52).

(h) *There is a high degree of centralisation in the determination of policy. Indeed, the determination of educational policy essential-ly takes place in the Cabinet. Similarly, all important finance decisions are taken centrally, outside the education system. With-in the system "control over virtually all important educational de-cisions rests at Department level"* (p. 52). *Thus, while the system shows decentralised <u>structures</u>, the processes are highly central-ised. This in practice leads to what the authors call the "decen-tralisation paradox", in which the decentralisation of administra-tive authority, when combined with centralised decision-making, actually weakens the effective involvement of the <u>user</u>.*

As will be seen in later sections of this report many of these conclu-sions have been borne in mind by the work committee in drafting its pro-posals.

1.2.2.2 Tertiary level

The work committee commissioned only one study in this area, and re-ceived from Dr J.B.Z. Louw (1981.a) a detailed and complex report. A written response described the report as follows:

"Die indruk word verkry dat hier 'n baie deeglike stuk werk gedoen is.

Die opsteller is vertroud met die struktuur en opset van tersiêre in-
rigtings."

The work committee was generally in agreement with this judgement,
though some concern was expressed concerning the section on technikons.
However, this specific concern did not affect the general conclusions
reached.

The report has 67 pages of descriptive material in which the various sub-
systems of tertiary education are analysed in detail. This is followed
by a section of 19 pages in which the management of tertiary education
is evaluated according to the following criteria:

- *billikheid en regverdigheid aan almal moet geskied;*
- *onderwysbestuur funksioneel effektief en administratief doeltref-
  fend moet geskied.*

The conclusions reached by the application of these criteria are argued
in detail, and then summarised in the final section under 25 paragraphs
(Paragraphs a - y, paras. 5.1 - 5.5). As these findings are very suc-
cinctly stated in the research report, no purpose is served in repeating
them here, and the reader is referred to the full text.

The guidelines for changes that would, in the researcher's opinion, lead
to improvements in the management of education at the tertiary level are
set out in the final section. The work committee was of the opinion
that not all the important points made in the report are reflected in
the final section. The list of issues below, therefore, includes both
the researcher's own conclusions and other matters felt by members of
the work committee to be important:

(a) the over-all control and management of education at the tertiary
    level requires rationalisation;

(b) this rationalisation should lay emphasis upon the autonomy and in-
    dividual character of institutions, but aim at more effective man-
    agement, especially as regards resources;

(c) the right of admission of students, without permits, should be grant-
    ed to universities;

(d) the mobility of students between institutions at the tertiary level should be facilitated;

(e) the question of certification requires further attention.

1.2.3 <u>Other research utilised</u>

On pages (vii) and (viii) reference is made to research used by the work committee but not directly commissioned by it. These documents were certainly influential in the discussions of the work committee, and in the use made by the chairman of concepts advanced in them, which have in some cases been incorporated in his drafts.

As the research was not commissioned by this work committee, no detailed analysis of the documents was made by the committee during its discussions. A study of the proposals in Chapter 2 of this report will show, however, that two important concepts have been derived from this research, namely:

(i) the three-level management structure suggested by Stone (1981): central level, middle level and local level. This is set out in detail on pages 19 - 35 of his report, and was taken into consideration in the proposed structure recommended by the committee;

(ii) the distinction put forward by B.A.J. van Rensburg (1981) between *open* and *closed* systems of education also influenced the committee, especially as regards the inter-relationship of the three levels, and the relationship of the education system to the wider social system in which it operates.

Further specific reference to material taken from these sources is included in the text of the report.

1.2.4 <u>Written input from work committee members</u>

In addition to documentation prepared by the chairman as working papers for the committee, the following documents were prepared at one time or another by members of the committee, or one of the subcommittees.

(i) <u>Evaluative concepts for the analysis of educational policies, structure and programmes</u>: Prof. W.B. Vosloo (first draft: 17.10.80, second

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draft: 22.1.81.). Appendix B.

ii)   Framework for the analysis of education management: Prof.W.B. Vosloo
        (22.1.81). Appendix C.

iii)   Comment on (ii): Dr I.M. Rautenbach (23.1.81).

iv)   Notes on devising objectives from the Principles: Dr R.H. Lee (23.1.81).

v)   Evaluation of the research by Prof. Steinberg and Prof. V.d. Merwe: Mr
        C.A. Naguran (for subcommittee, 6.3.81). Appendix E.

vi)   Evaluatory comment on research report by Messrs Buchland and V.d. Berg:
        Mr C.D. Beukes (for subcommittee 6.3.81). Appendix D.

vii)   Notes on methodology and some management concepts: Mr I. Robson (for
        subcommittee, 6.3.81).

viii)   Some observations on the proposed consultative body for education in
        South Africa: Mr I.H. Robson (9.4.1981). Appendix G.

ix)   Report on Implementation Models of Education Management: Mr J.F. Steyn
        (9.4.1981). Appendix F.

x)   Memorandum on certain proposals of the Work Committee: Education Man-
        agement: Prof. J.H. Jooste. (May 1981). Appendix L.

.3   STATEMENT OF OBJECTIVES

.3.1   Objectives derived from the request to the HSRC

        The request to the HSRC, and the objectives derived from this are dis-
        cussed on pp. (i) and (ii) of the *Orientation*. The work committee reach-
        ed two conclusions in this regard:

i)   It should be assumed that the Principles, as approved by the Main Commit-
        tee on 23 February 1981, did give effect to the main points arising from
        the request, and could thus be taken as the basis for further objectives,
        subject to (ii) below.

ii)   The request states that a *practicable* system for education should be de-

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vised. For obvious reasons, the Principles do not concern themselves with *practicability*; however, this becomes a primary concern in devising a system of education management. Accordingly the committee gave extensive consideration to the following:

- possible acceptability of alternative systems of management

- criteria of effectiveness and efficiency in management

- methods of introducing changes in a manner that would increase acceptability.

These must therefore be seen as additional objectives derived from the original request.

1.3.2 Objectives as derived from the Principles for the provision of education (basic objectives)

These objectives are regarded by the committee as *basic objectives*, i.e. they are derived from basic assumed values, requiring no further justification than that they are held to be right by those who believe in them. The process of reaching the *basic assumed values* in this case was taken to be that by which the Principles were agreed in the Main Committee.

At the level of national management of the system of education, each Principle has some bearing upon the desired and practicable structure, and all were discussed at one time or another by the committee. However, the following Principles were taken to be more important in this context (the Principles are given in full in Appendix A.):

Principle 1 : equality of opportunities and standards

Principle 2 : recognition of commonality and diversity

Principle 3 : recognition of freedom of choice

Principle 6 : state responsibility for formal education

Principle 7 : shared state and private sector responsibility for non-formal education

Principle 9 : reconciliation of centralised and decentralised elements

Principle 10 : recognition of professional status of teachers

Principle 11 : on-going research, planning and development.

In determining the objectives of the system of education, therefore, attempts were made to give effect to each of the above.

1.3.3 Objectives derived from management criteria (instrumental objectives)

A second level of objectives was taken by the committee to be *instrumental* in the sense that they refer to the processes and structures by which the basic objectives are to be achieved. These instrumental objectives should be such that they

(a) provide guidelines for achieving the basic objectives which are compatible with those objectives, and

(b) provide means of directing the management process in the most effective manner.

Four objectives were decided upon in this area, and used in the analysis of research findings, and in the proposals for a new system. These are:

(i) that the functional inter-relationship between the Principles implies that the system should be relevant to the needs of the inhabitants and capable of providing education of the desired quality;

(ii) that the system should be capable of implementation (*practicable*) and should possess the possibility of obtaining legitimacy and credibility among·*users*.

(iii) that the system should be effective and efficient; and should also be flexible in responding to the needs for innovation and change;

(iv) that the system should contain provisions for accountability.

(See Appendix B for a full statement of evaluative concepts and criteria.)

1.3.4 Final statement of objectives

The committee had all the above considerations in mind when discussing the final statement of objectives for the management of the system of education. At its meeting on 27 February, the committee approved for

working purposes the following statement of objectives:

1.3.4.1 to create, develop and maintain management structures and processes that will enable education in South Africa to be relevant to the needs of the individual and of society, and of a quality capable of serving these needs;

1.3.4.2 to create, develop and maintain management structures and processes which positively enable progress towards:

(a)   the establishment of educational facilities of equal quality, and

(b)   the attainment of equal opportunities of making use of these facilities (Principle 1);

1.3.4.3 to create, develop and maintain:

(a)   centralised (national) decision-making structures and processes, forms of participation, negotiation, co-ordination and control which ensure representation of

all the inhabitants of the RSA,
religious interests,
community interests,
cultural interests,
the interests of the teaching profession, (including private schools), commercial, industrial and economic interests (including trade unions),

in shared decision-making on matters of common national policy, allocation of resources, the teaching profession, the broad curriculum, standards and certification (Principles 2, 9 and 10);

(b)   decentralised (regional, local) decision-making participatory, co-ordinating and control structures and processes which ensure representation of all the interests in the region or locality, and which ensure the right of *free association*, the greatest possible freedom of parental choice and the widest range of options to meet the needs of the individual (Principles 2, 3, 4 and 9);

(c)   *reconciling* management structures and processes that will provide:

balances between centralised and decentralised control;

checks on the accretion of power by the centralised bureaucracy;

monitoring of decentralised structures, processes and activities so that there is no breakdown in, or diminution of the common aims and objectives set as policy at the national level (Principle 9);

1.3.4.4 to create, develop and maintain management structures and processes which ensure:

(a) the provision of education which would maintain a balance between the needs of the individual and the needs of society (Principles 4 and 6);

(b) an integrated, flexible relationship between formal and non-formal education, between school and the world of work, in the context of lifelong continuing education (Principles 4, 5, 6 and 7);

(c) the recognition and achievement of professional status for teachers and effective channels of negotiation (Principle 10);

(d) a system of education that will remain sensitive and responsive to changes - social, economic and political - in society, and which will be based on continuing research, so that it contributes positively to the creation of a society in which equality of opportunity becomes more possible (Principle 11).

1.3.5 Use of objectives

1.3.5.1 in assessing the research:

The subcommittee assessing the research critically examined the findings in the light of these objectives, in order to identify international or local evidence for effective ways of achieving such objectives. The analysis in paragraph 1.2, and the written contributions of Messrs Beukes and Naguran (see Appendices D and E) refer to much of this evidence, which will not be repeated here.

1.3.5.2 in providing a basis for the proposals:

The committee had these objectives before it in discussing proposed

forms of management of the education system. The structures and pro-
cesses discussed were considered in the light of the degree to which
they would·contribute to the achievement of these objectives. As the
objectives in turn are derived from the Principles and the request to
the HSRC, the intent of the work committee was to produce proposals
which were also in accord with both those basic documents.

1.4   CATEGORIES OF ANALYSIS

1.4.1 Development of categories

In its first meeting on 19 September 1980 the work committee agreed to
a provisional operationalisation of the theme of education management.
This included four categories which would be used to analyse various
systems of educational management and possibly provide the basis for
eventual proposals.

At the time, the categories of analysis were defined as follows:

- decision-taking and consultation
- control and co-ordination
- flow of information and planning
- organisation and administration.

These categories were used by the subcommittee comprising the chairman
and Profs Swart and Vosloo when issuing briefs to the researchers and in
analysing information coming to hand at that time.

Prof. Vosloo further developed these concepts in his paper Framework for
Analysis of Education Management, Appendix C, (22.1.81) in which he
identified six main categories, namely:

(i)   organisational structure

(ii)   policy-making, planning and implementation

(iii) financial aspects

(iv)   personnel aspects

(v)   control

(vi)   reform and innovation.

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After discussion of this paper at the meeting of the work committee on 22nd January, these categories were further refined, and this last version was utilised by the chairman in his <u>Outline Structure of Report to Main Committee</u> (21.2.1981). In this document they appeared as follows:

As pointed out in paragraph 1.1.1(iv), 1.4.1(iii) and (iv) above were <u>not</u> among the main concerns of the committee, in terms of the 'operationalisation' of the themes by the Main Committee.

- decision-making, participation, consultation
- administration, control and co-ordination
- communication, information, research, development and planning.

Further discussions on 23 February, especially in the light of the research findings, led to a final reformulation, set out in 1.4.2 - 1.4.4 below:

1.4.2 Management structure

This refers to the hierarchical arrangement of institutions at various levels in a system of education management. The structure is designed to ensure that decision-making takes place at appropriate levels, and thus functions also as a control mechanism. Finally, <u>administration</u> and <u>co-ordination</u> of the system takes place through the management structure.

In the system proposed later in this report, the management structure has been described at three levels, namely national, regional and local, and the decision-making power at each level broadly defined.

1.4.3 Management process

As indicated in paragraph 1.2 above, most of the researchers cautioned against concentrating solely upon structures, and ignoring the <u>processes</u> through which the system is managed. Here attention needs to be paid to issues such as participation and consultation in respect of decision-making; the nature of the *actors* concerned; and the way in which legitimacy and credibility is achieved by the system of education management. Considerable attention is given to this in paragraph 2.4 of the report.

1.4.4 Management infrastructure

It is a truism of management that decisions are only as good as the in-

formation on which they are based. Each management system should accordingly provide for the collection, organisation and dissemination of reliable information as an *infrastructure* to the process and structure. This concept has been described at various times during the work of the committee as:

- *flow of information and planning* (Sept. 1980)
- *reform and innovation* (Jan. 1981)
- *communication, information, research, planning and development.*

It is in the final sense that it has been used in the report itself.

In Chapter 2 the concept of management structure has been used as the basis for presenting the proposal. However, both process and infrastructure are dealt with in the text, and special attention is paid to process in paragraph 2.4.

CHAPTER 2

MANAGEMENT OF EDUCATION ON THREE LEVELS

2.1   MANAGEMENT OF EDUCATION AT THE FIRST (CENTRAL) LEVEL

2.1.1   Preliminary observations and considerations

2.1.1.1 Evaluation of alternatives

The alternatives considered by the work committee, as listed in para·-
graph 2.1.1.2 below, were evaluated in the light of:

(i)   the original terms of reference from government (Orientation, pp. (i) and
        (ii)) and the objectives derived from them (see paragraph 1.3.1);

(ii)   the general principles agreed upon by the Main Committee (see Appen-
        dix A) and the objectives derived from them (see paragraph 1.3.2);

(iii)   the instrumental objectives derived from general management criteria
        (see paragraph 1.3.3).

        At the first level of education management (centralised, national level)
        the two primary objectives to be attained were:

(iv)   to create, develop and maintain management structures and processes
        which positively enable progress towards the establishment of educa-
        tional facilities of equal quality, and the attainment of equal oppor-
        tunities of making use of these facilities (Principle 1 - see also
        paragraph 1.3.4.2).

(v)   to create, develop and maintain centralised (national) decision-making
        structures and processes, forms of participation, negotiation, co-or-
        dination and control which ensure representation of all the inhabitants
        of and the various interests in South Africa, in shared decision-making
        on matters of common national policy, allocation of resources, the
        teaching profession, the broad curriculum, standards and certification
        (Principles 2, 9 and 10 - see also paragraph 1.3.4.3(a)).

2.1.1.2 The alternatives

At ministerial and departmental level there are basically three alter-

natives that have been suggested in the memoranda and reports submit-
ted to the Work Committee: Education management. They are as follows:

(i)   The maintenance of the existing three ministries and departments -

        National Education
        Education and Training
        Internal Affairs

        but with the addition of a co-ordinating cabinet committee (or council
        of ministers) at the political level and some form of co-ordinating,
        advisory council, representative of all the inhabitants of and inte-
        rests in South Africa, at the education level., to provide a common base
        for decision-making and policy.

(ii)   The second proposal is based on interpretations of constitutional ten-
        dencies inherent in the concept of the President's Council, under which
        there would be two ministries and departments, the one responsible for
        Black education and the other for the education of all the other groups.
        The co-ordinating machinery would be similar to that proposed in para-
        graph 2.1.1.2(i). In the structure of the department responsible for
        all education except that of the Black people there would appear to be
        two further options - a structure based on education function and the
        other on ethnic divisions.

        (NOTES: 1. More detailed *models* based on these alternatives are to be
                    found in Appendix F.

                2. The idea of a council of ministers (see paragraph 2.1.1.2
                    (i) and (ii)) might well be pursued as a method of provid-
                    ing political machinery that would make it possible for the
                    benefits of a new educational dispensation to be extended
                    to those states such as Transkei, Bophuthatswana and Venda
                    that were previously part of the RSA. If *equality* is ac-
                    cepted as a principle there is a moral obligation for the
                    implications of this to be accepted in the development
                    support given to these former territories. Some special
                    kind of arrangement would seem to be warranted so that they
                    are not excluded from the benefits of any new dispensa-
                    tion.)

(iii)   The third proposal is for a single ministry and department at the first
        level, backed up by strong statutory consultative bodies of a non-ra-
        cial character and representative of all the inhabitants of and inte-
        rest groups in South Africa. Within this model also, two options have
        been suggested for the structure of the department - one based on edu-
        cation function, the other on ethnic (*client*) function.

        It is imperative that this proposal for a single central administration
        should not be seen as the extension of monolithic bureaucratic autho-
        rity from the centre downwards throughout the system, but in the con-
        text of the further proposals at *middle* and *local* levels. At these
        levels there is an emphasis on diversification, the accommodation of
        religion, language and culture, and freedom of parental choice. Louw,
        in discussing tertiary education, gives a further insight into the
        unity-diversity, centralisation-decentralisation continuum that is of
        wider application (see also paragraph 2.2.1(i) for a further discus-
        sion).

        *"Dit beteken dat beplanning op oorhoofse vlak gepaard moet gaan met
        sinvolle en wesenlike devolusie van gesag en gevolglik ook administra-
        tiewe dekonsentrasie. Onderliggend aan hierdie mikpunt is die behoef-
        te aan die afwenteling van die verantwoordelikheid vir besluite wat nie
        op 'n oorhoofse beleidsvlak lê nie en wat dus nie tegnies, algemeen en
        onpersoonlik van aard is nie, na vlakke waar beter oor sulke sake be-
        sluit kan word. Op die hoogste owerheidsvlak sal dus besluite geneem
        word oor sake wat die algemene belang raak, terwyl aan die ander kant
        van die kontinuum : algemene - besondere, besluit sal word oor sake wat
        met die besondere, die partikuliere te make het en wat dus die diversi-
        teit in die stelsel weerspieël"* (Louw, 1981(b), p. 4).

        It is therefore necessary to refer to paragraphs 2.2 and 2.3, in order
        to place the proposal for a single central administration in the proper
        perspective.

2.1.1.3 The preferred alternative

        In evaluating these proposals the judgement of almost all the members
        of the work committee was that the third proposal, with a central de-
        partment structured in terms of education function, most effectively
        responds to the need for the implementation of a common national edu-

cation policy derived from shared decision-making, consultation, parti-
cipation and negotiation among all the people and interests concerned.

Among the considerations leading to this judgement are the following:

(i) The third alternative best meets the situation in which the great ma-
jority of the people concerned in the negotiating process are not re-
presented in the political structure of which the ministry is a part,
and where, historically, separate ministries and departments have re-
sulted in 'unequal' opportunities being available, 'unequal' resources
allocated and 'unequal' standards applied;

(ii). For a proposal to be *practicable* it has to be acceptable to the great
majority of the people (*users*) for which the system is intended; in
negative terms the first alternative would be rejected by the great ma-
jority, while the second, at best, would have only very limited accept-
ance.

(iii) In management terms, for the proposed South African Council for Educa-
tion (which is unanimously supported in the work committee) to nego-
tiate with and work through more than one minister and departmental
head would appear to -

jeopardise its effectiveness as an instrument by which to achieve co-
operation and agreement on matters of common national policy, alloca-
tion of resources, the teaching profession, the broad curriculum, stan-
dards and certification (see objective 1.3.4.3).

lead to *polarisation* of interests within the council according to the
particular interests of the minister and department being advised;

tend to perpetuate differentiation on other than educationally relevant
grounds;

endanger the fair and just allocation of resources because of the com-
peting claims of different ministries and departments, even should cer-
tain norms be laid down - separate instead of *global* stances would be
taken up.

(iv) Even if the SA Council for Education were to advise and negotiate with
a council of ministers (or cabinet committee) these difficulties would
remain;

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co-ordination at political or departmental level is not an effective
substitute for a common, unified approach through one ministry and one
department;

and decision-making would effectively be removed from the *meeting
ground* between education council and minister to the council of minis-
ters.

(v)   If equality of opportunity and standards is to be achieved, and to be
perceived as being achieved, the point at which decisions are taken and
at which negotiation takes place, and from which the implementation of
policy is carried out, should be as clearly defined as possible and
subject to as little 'politicisation' as possible: only a common, uni-
fied *meeting point* in which all interests are treated equally, without
separation or division, will provide this kind of position for educa-
tion at the central level of government.

At the first (central) level of education management it is imperative
that the principle of unity should take precedence over the balancing
principle of diversity, the needs of which are met at other levels
nearer to the people.

2.1.1.4 The vital position of the South African Council for Education (see
paragraphs 2 and 3)

While all the consultative bodies that are proposed as back-up support
and as providing the 'checks and balances' necessary to sound decision-
making and effective administration are of fundamental importance to
first level (central) education management, the Council itself is ab-
solutely indispensable to an educational future in which inequalities
of opportunity, quality and standards are to be eliminated. This is
so, because -

it is imperative that the momentum generated by the present investiga-
tion not be allowed to dissipate and that a fully representative body
continue the debate and the work started by the HSRC - there are no
final solutions in education;

it is imperative that all the inhabitants of South Africa be represented
and involved in the decision-making processes that will lead to changes
in the system of education provision in South Africa;

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it is imperative that, in particular, decisions on the allocation of resources, financial, material and human, be joint decisions so that it is seen that there is a fair and just intention to work towards equality of opportunity and the attainment of equal standards throughout the South African system.

Whatever delays may be justified because of the need to unravel the present subsystems, the one thing that must be done immediately is to set up the South African Council for Education and to give it as powerful a public position vis-a-vis the minister as is realistic in terms of the present situation.

2.1.2   Proposals in general : Statutory Consultative Bodies

In the proposals that follow, consideration is given to the functions and composition of a number of statutory consultative bodies, as well as to related issues and considerations.

The South African Council for Education, which would have clearly defined functions and rights in relation to the responsible minister, inter alia,the right to be consulted before decisions are taken at the political level, the right of access to the minister in order to initiate negotiation and proposals, the right to consider and report on financial estimates and the allocation of financial resources within approved overall budgets, the right to monitor educational programmes aimed at attaining equal opportunity throughout the system of education provision, the right to establish standards for the whole country.

In carrying out these and other functions the Council would be supported by a number of more specialist consultative bodies.

(a)   The first group would be directly linked to the Council and would be served by the same general secretariat under the overall supervision of the chief executive officer of the Council:

(i)   The Permanent Committee for Curriculum and Examinations

(ii)   The Permanent Committee for Tertiary Education

(iii)   The Permanent Committee for Adult and Non-formal Education.

(b)   The second group, while equally important in terms of advice, informa-

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tion and support to the Council is composed of bodies, which because of the nature of their functions, must have greater autonomy and independence:

(i) The South African Teachers' Council

(ii) The Council for Educational Research and Development

(iii) The organised teaching profession, through constituted professional associations.

These various consultative bodies are now dealt with seriatim, with the exception of (iii) which is the concern of the teaching profession. In terms of the proposals of the work committee, however, there are direct implications for the organisational structure of the teaching profession in South Africa.

2.1.3   The South African Council for Education

2.1.3.1 Functions (in broad outline)

As a statutory body the Council, apart from its direct relationship with the minister and department, would fulfil its role of public accountability by reporting to Parliament. Not only would its reports and work generally be open to public scrutiny, but it would actively seek to inform all South African interests of its proposals and recommendations in the field of education. It would have the right to require reasons for the non-acceptance of its recommendations by education authorities, as also the right to regular reports from such authorities on the progress of the process of educational reconstruction and reform. In carrying out its functions the Council would take cognisance of overall social, economic and political needs and development plans and of the role of education in the general development of South Africa.

(i)   To advise the responsible minister on the broad educational policy of South Africa, both formal and non-formal, at all levels (from pre-primary through to tertiary and adult education) particularly with regard to the achievement of programmes aimed at equal opportunity and equal standards; the relationships between the central, middle and local levels of educational administration. (See also Permanent Committee for Tertiary Education, Permanent Committee for Adult and Non-formal Education.)

(ii)   To evaluate, report and make recommendations on the annual national estimates for education and on the allocation of financial resources to central and middle level departments and institutions.

(iii)   To evaluate, report and make recommendations on the implementation of broad policy at the central, middle and local levels, both in relation to the allocation of resources and the development of equal opportunities and equal standards in the provision of education to all the inhabitants of South Africa.

(iv)   To report and make recommendations on recruitment of, common criteria, conditions of service, salaries, certification requirements for all teachers who compose the SA Teaching Service (in consultation with the SA Teachers' Council and the teachers' professional associations).

(v)   To take responsibility for and make recommendations on ongoing planning, review, research into and development of the provision of education in relation to changing needs and circumstances (in consultation with the Council for Educational Research and Development).

(vi)   To take responsibility for establishing broad curricular requirements and to provide advice and support in curriculum matters to the middle level systems (through the Permanent Committee for Curriculum and Examinations).

(vii)   To take responsibility for establishing common external public examination standards and the requirements for certification at the pre-tertiary level (through the Permanent Committee for Curriculum and Examinations).

2.1.3.2 Composition

In general terms the South African Council for Education should be broadly representative of (which limits nomination by central government) all the inhabitants of the RSA, religious and community interests, the teaching profession and economic interests (agriculture, commerce, industry).

(i)   Chairman   )
        Vice-Chairman) initially it would probably be necessary for these to be nominated by government from a panel of names submitted by various

representative groups: they should be independent of other consulta-
tive groups at either central or middle level. At a later stage they
should be elected by the members of the Council.

MEMBERS

(ii)   Chairman (or alternates) of all education councils operating at the
        second (middle) level. (N.B. if national states, in terms of education,
        were to operate as distinct components of the middle level, they would
        be represented in this group.)

(iii)   Chairman (or one other representative) of each of the following:
        SA Teachers' Council, plus three further SATC representatives so that
        various interest groups within the teaching profession have sitting;
        Permanent Committee for Curriculum and Examinations;
        Permanent Committee for Tertiary Education;
        Permanent Committee for Adult and Non-formal Education;
        Council for Educational Research and Development.

(iv)   FOUR representatives nominated by the organised teaching profession
        through the professional associations.

(v)   Conveners (or alternates) of each of the following:

        Committee of University Principals;
        Committee of Principals of Technikons;
        Committee of Principals of Teacher Training Institutions;
        Committee of Heads of Education Departments at the middle level,
        plus three further representatives from this Committee;
        two representatives of private school organisations.

(vi)   TEN representatives of employers' organisations, staff associations and
        trade unions so that private sector interests in commerce, industry and
        agriculture are fully recognised.

        Two of these representatives should come from the National Training
        Council and the Manpower Commission.

(vii)   In order to ensure as widely representative a body as possible, and to
        fill the gaps presented by the existing nature of societal organisa-
        tion in South Africa, SIX members representative of cultural interests

should also be appointed. Within this group the opportunity should
also be taken to ensure that women are represented on the Council.

(Note: Should the independent states of Transkei, Bophuthatswana and
Venda (later also Ciskei) decide that close co-operation and liaison in
educational matters is of importance to them, arrangements should be
made for them to have representation on the Council.)

2.1.3.3 As the membership of the Council will in all probability in total be
about 50, it will be necessary to have an executive committee that will
meet frequently to carry the major burden of the work of the Council.
It is suggested that its composition should be along the following
lines:

Chairman
Vice-Chairman
Chairman (or representative) of -
SA Teachers' Council
SA Council for Curriculum and Examinations
SA Council for Tertiary Education
SA Council for Adult and Non-formal Education
SA Council for Educational Research and Development
Committee of Heads of Education Departments at middle level
Representative of Manpower Commission
Three chairmen (or alternates) of education councils as widely repre-
sentative as possible of the middle level
Three additional members of the Council to ensure that the executive
committee reflects the various interests represented in the larger
body (15 in all).

2.1.3.4 Organisational matters

(i)   As the Council will have a very heavy responsibility for bringing a new
educational dispensation into being and guiding and monitoring its pro-
gress, the chairman and vice-chairman will need to devote the whole of
their time to its affairs, should be in a position to do this and
should be adequately remunerated for their services.

Together with the chief executive officer they will form the group re-
sponsible for the day-to-day direction of the affairs of the Council.

(ii)   The chief executive officer will be the head of the secretariat of the
        council, which should have strong finance and planning components. In
        its composition the secretariat should be representative of all the
        people of the country.

        The chief executive officer will also have overall responsibility for
        establishing and supervising the secretariats of some of the consulta-
        tive bodies linked to the Council namely:

        Permanent Committee for Curriculum and Examinations
        Permanent Committee for Tertiary Education
        Permanent Committee for Adult and Non-formal Education.

        The chief executive officer will be responsible to the Council and not
        to the minister.

        (Note: The director-general of the central State Department of Educa-
        tion will be in attendance at all meetings of the Council and its execu-
        tive as will the chief executive officer of the Council, but neither
        will have voting rights as they will not be members of the Council as
        such.)

2.1.4   Permanent Committee for Curriculum and Examinations

2.1.4.1 Introductory notes

(i)   The standpoint that is adopted is that while curriculum development is
        a highly specialised, professional activity it is not solely a *techni-
        cal* matter that is the concern of the professional alone; similarly
        with examination standards. Both must have legitimacy and acceptance
        in the community and must be perceived to be achieving the broad ob-
        jectives that society has set its system of educational provision.

(ii)   The area of operation of the committee would include all education ex-
        cept formal tertiary level education; in the field of adult and non-
        formal education it would work closely with the committee responsible
        in general for this field. Nor would there be any restriction on ter-
        tiary level institutions consulting with the curriculum unit in the
        light of its specialised knowledge in this particular area.

(iii)   The model proposed brings together curriculum matters and examination
         standards under the same committee; an alternative proposal was that
         there should be two separate committees. The first was adopted be-
         cause it is believed that assessment and examination are an integral
         part of the curriculum process; while for practical purposes they might
         well operate as two arms of the committee, it is important that the
         latter, at the policy-making level, should be able to reconcile and
         integrate the two.

(iv)   In setting up a curriculum unit to act as one of the operating arms of
         the committee, consideration might be given to an initial stage in
         which administratively it falls under the present Human Sciences Re-
         search Council, but with a separate physical and geographical existence,
         and responsibility to the committee outlined in this proposal. Some
         independence of this nature will be necessary if it is to gain accept-
         ance from second level education departments with inherited 'bureaus'
         or curriculum units.

(v)   As far as the objective of establishing national standards of evalu-
         ation, assessment, examination, accreditation and certification are
         concerned, careful consideration will have to be given to the position
         of the present Joint Matriculation Board, the function of which should
         perhaps be more clearly defined in terms, solely, of university en-
         trance standards. If maintained, it could well become a smaller body,
         as its broad representation, unique in South Africa in the past, will
         have been achieved in other ways under the new dispensation.

2.1.4.2 Functions

(i)   To establish broad national minimum guidelines (not, for example, 'core'
         syllabuses) for the curricula of non-tertiary educational institutions
         and programmes in South Africa, and to advise the SA Council for Edu-
         cation on these matters.

(ii)   To establish national standards of evaluation, assessment, public exam-
         ination, accreditation and certification, which would be applicable to
         all schools and educational programmes at the non-tertiary level in
         South Africa, and to advise the SA Council for Education on these mat-
         ters.

(iii)   To provide a professional service to middle (second) level education

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authorities with regard both to curriculum development and adaptation to local and special needs, as also examination and assessment at the middle level. Ideally, this could operate on a 'contract' basis, thus preserving the greatest degree of middle level and local independence in the area of decision-making on curricular matters.

(iv)   To initiate curriculum experimentation and innovation (generally by setting up pilot projects) in co-operation with education authorities and, for example, university departments of education, so that a sensitive and relevant response to individual and societal needs is maintained.

(v)   To provide the kind of professional service outlined in paragraphs (iii) and (iv) above, also to the private sector and voluntary agencies engaged in adult and non-formal education, preferably again on a 'contract' basis.

2.1.4.3 Composition

(i)   Chairman   }
Vice-Chairman } initially to be nominated by the SA Council for Education, thereafter to be elected by the committee itself.

(ii)   Representatives of the teaching profession nominated by the SA Teachers' Council.

(iii)   Representatives of the teaching profession nominated by teachers' professional associations.

(iv)   Representatives of tertiary level institutions nominated by the Permanent Committee for Tertiary Education and to include persons engaged in teacher education.

(v)   Representatives of commerce, industry and agriculture, chosen particularly from those involved in education and training programmes.

(vi)   Representatives of middle level consultative councils (not education departments) as members of the adult community in their position as parents and employees (trade unions, staff associations, etc.).

(vii)   Representatives nominated by the Committee of Heads of Education De-
        partments at the middle level.

(viii) One representative from each of the following -

        Council for Educational Research and Development
        Permanent Committee for Adult and Non-formal Education.

        (Note:
        (a) each group from (ii) to (vii) would consist of about four members;

        (b) the executive committee of the Permanent Committee would be com-
             posed of the chairman, vice-chairman and one member from each of·
             the groups (ii) to (vii), making eight in all;

        (c) the secretariat would be provided and set up by the chief executive
             officer of the SA Council for Education;

        (d) the head of the curriculum unit and the professional officer in
             charge of examination and certification matters would attend all
             committee and executive meetings.)

2.1.5   Permanent Committee for Tertiary Education

2.1.5.1 Preliminary observations

(i)   The basic assumption underlying the model that is proposed is that at
       the tertiary level the unit of management is the individual institution,
       to which the greatest degree of autonomy should be granted consistent
       with accountability for the provision of education and public expendi-
       ture on it.

(ii)   Balanced against this is the need for co-ordination at this level in
       order to:

       prevent fragmented and segmented decision-making in matters of broad
       policy on tertiary education;

       prevent unnecessary duplication leading to less than optimum use of
       high-level human resources;

       create for the adult learner the greatest degree of *horizontal* mobility
       and transferability from one programme to another and from one type of

institution to another;

make possible overall planning for the development of tertiary level
facilities adequate for and relevant to the needs of South Africa.

(iii)   Neither accountability nor co-ordination are to be interpreted as mean-
          ing bureaucratic control, but are rather to be achieved by co-opera-
          tive, democratic mechanisms and processes in which the autonomous in-
          stitutions themselves play a major part, and share in the decision-
          making with other groups that have a righful interest in tertiary edu-
          cation.

(iv)   The model for the Permanent Committee for Tertiary Education proposes
          that it be built up from three constituent components:

          Consultative Committee for University Education
          Consultative Committee for Technikon Education
          Consultative Committee for Teacher Education
                    ,
          which in their turn would have a major input from -

          Committee of University Principals
          Committee of Technikon Principals
          Committee of Principals of Institutions for Teacher Education.

          To these would be added, at consultative committee and permanent com-
          mittee level, representatives of those bodies/groups with a rightful
          interest in tertiary education.

(v)   Other areas of tertiary education, such as nursing, agriculture and
          that offered by professional associations, will require further inves-
          tigation and consideration in order to determine the most effective
          way of integrating them into this proposed model.

(vi)   Of these three major components in the provision of tertiary education
          the universities for Whites have developed furthest in terms of both
          individual autonomy and group co-ordination. The time is now ripe to
          extend the same level of autonomy to all universities, to include them
          all in the relevant co-ordinating and consultative bodies (placing the
          emphasis on function and objective rather than *client*) and to remove
          permit restrictions on decisions as to the admission of students.

(vii)   While the technikons have further to go, they should be enabled to
         travel the same road as quickly as possible, and in view of the urgent
         need in South Africa for men and women with advanced technical skills,
         their facilities should be made available to all sections of the popu-
         lation.

(viii)   The field of teacher education is a much more complex one, not only be-
         cause of the highly divisive nature of the present organisational ar-
         rangements and control mechanisms,but also because of the wide range of
         levels at which it takes place in various communities. As a starting
         point it is proposed that all institutions concerned solely with teach-
         er education at the tertiary level should be linked to universities
         (and not to employing agencies such as *second level* education depart-
         ments) and that decisions on the admission of students should be made
         by the university concerned. Institutions concerned with teacher
         training at the pre-tertiary level (as long as this continues) should
         remain the responsibility of education departments.

2.1.5.2 Functions

(i)   In very broad terms the Permanent Committee for Tertiary Education
         would:

         consult with and provide advice to the SA Council for Education and the
         Ministry of Education on matters affecting tertiary education; in this
         respect it would act as the major arm of the SACE in carrying out the
         first two functions of the latter, in the specific area of tertiary
         education;

         provide co-ordinating and consultative machinery linking the various
         tertiary institutions and the various components of tertiary education,
         as also providing wider links with other bodies/groups with interests
         in tertiary education.

(ii)   In more specific terms the functions of the Permanent Committee would
         be very similar to those of the present Universities Advisory Council
         but widened to include the total spectrum of educational institutions,
         programmes and activities at the tertiary level;

         in addition, it would have the specific function of ensuring greater
         mobility and transferability for the student within the tertiary sys-

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tem in order to avoid the wastage of potential at this level;

and, finally, ensuring that equal opportunities are offered and equal standards maintained in education provided at the tertiary level.

(iii)   The functions of each of the three consultative committees within the Permanent Committee would, in general, be similar to those laid down for the latter but would have specific reference to the particular area of responsibility –

university, technikons or teacher education. The latter committee would work very closely with the SA Teachers' Council and the teachers' professional associations.

2.1.5.3 Composition

(i)   The Consultative Committee for University Education would be composed of representatives of:

Principals/Rectors of universities, elected by the Committee of University Principals;

university councils (which would be a method of including *community* expertise, in the field of finance, for example);

university senates and staff associations;

professional associations (e.g. law, medicine, engineering) and other private sector interests;

a representative of each of the other tertiary level consultative committees and of the Committee of Heads of Education Departments (second/ middle level).

(Serious consideration should also be given to the representation of student interests/associations.)

Each category should have about three representatives, and the Committee would elect about one-third of its number to serve on the Permanent Committee. Initially the chairman would be appointed by the latter, thereafter the Committee would elect its own chairman and vice-chairman.

(ii)   The Consultative Committee for Technikon Education would be composed
         of representatives of:

         Principals of technikons, elected by the Committee of Technikon Prin-
         cipals:

         technikon councils;

         technikon 'senates' and staff associations;

         professional associations such as those linked to the Associated Scien-
         tific and Technical Societies;

         employer associations and trade unions, and other private sector in-
         terests;

         a representative of each of the other tertiary level consultative com-
         mittees and of the Committee of Education Heads (second/middle level).

         Each category should have about three representatives, and the Commit-
         tee would elect about one-quarter of its number to serve on the Perma-
         nent Committee. The position of chairman would be dealt with as in
         paragraph 2.1.5.3(i).

(iii)   The Consultative Committee for Teacher Education would be composed of
         representatives of:

         Principals of tertiary level colleges of education;

         heads of departments/faculties of education at universities;

         councils of colleges of education;

         staffs of colleges of education and university departments/faculties;

         South African Teachers' Council;

         teachers' professional associations;

         employing agencies - in the main the middle level education authorities.

         Each category would have about three representatives, and the Committee
         would elect about one-quarter of its number to serve on the Permanent
         Committee. The position of chairman would be dealt with as in para-
         graph 2.1.5.3(i).

(iv)   In the case of the Permanent Committee for Tertiary Education the fol-
        lowing members would be added to those elected by the three consulta-
        tive committees:

        One representative from each of the following -

        the SA Council for Education
        the Permanent Committee for Curriculum and Examinations
        the Permanent Committee for Adult and Non-formal Education
        the Council for Educational Research and Development
        the Council for Scientific and Industrial Research.

        Three representatives of the *private sector*, particularly with experi-
        ence in economics and finance.

        The executive committee should consist of about ten members of the Coun-
        cil, as far as possible representative of the three main areas in ter-
        tiary education.

        The secretariat would be provided and set up by the chief executive
        officer of the SA Council for Education.

2.1.6   Permanent Committee for Adult and Non-formal Education

2.1.6.1 Introductory note

(i)   Because of the importance of this comparatively new field of education
        for the resolution of many of South Africa's immediate and short-term
        educational problems, and because in this report it is seen as an inte-
        gral part of the national system for the provision of education, it is
        considered that, linked to and supporting the SA Council for Education,
        there should be a consultative group with specific responsibility for
        adult and non-formal education.

(ii)   In international terms *non-formal* education refers to organised educa-
        tion programmes, whoever organises or finances them and whatever the
        topic, that take place outside of the formal education system. In re-
        lation to the adult, non-formal education, particularly in less devel-
        oped countries, operates within three main areas:

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basic education

proficiency (skills) education

community education.

(iii)   In South Africa it should be seen as having two main objectives:

to redress the inherited inequalities in education among the adult population, and

to encourage a strong developmental (social and economic) momentum in society.

(iv)   In defining *adult* in the South African context there would appear to be two broad categories:

the first would accommodate those who had left school prematurely or were over the compulsory school-leaving age but under the age of about nineteen or twenty;

the second would be adults above this age.

In the immediate and short term the emphasis at both levels would be on the compensatory aspect of non-formal education as carried out in pro-grammes of basic and proficiency education.

This would be the broad context in which the Permanent Committee for Adult and Non-formal Education would carry out its task. For a more detailed account see the document from the Urban Foundation - Appendix H.

2.1.6.2 Functions

(i)   To make recommendations to the SA Council for Education on the broad policy to be followed in the field of adult and non-formal education, to establish the priority needs in the area and to suggest appropriate administrative structures for carrying out the policy.

(ii)   Within the broad policy guidelines laid down, to provide regular advice to the SACE, to the section within the department responsible for this area of education and to the private sector and voluntary agencies (consultative function).

(iii)   To carry out a *mediating* function and provide a link between government
        on the one hand and the private sector (employers, workers, voluntary
        agencies) on the other.

(iv)   To advise the SACE on the financial implications of policy, consider
        the annual financial estimates, recommend on government support (sub-
        sidies, levies, etc.) that should be made available to the private sec-
        tor and voluntary agencies.

(v)   Through regular liaison and consultation with middle level committees
        for adult and non-formal education to monitor and report to the SACE
        on the degree to which the two main objectives of redressing inequality
        and providing developmental momentum are being achieved.

(vi)   To take responsibility, in co-operation with the curriculum and examin-
        ations council, for the development of guidelines for adult education
        curricula and for formal certification standards where appropriate, in
        order to provide for alternative forms of access to the formal compo-
        nents of the system for the provision of education.

2.1.6.3   Immediate tasks

(i)   To provide financial support for programmes to train educators of adults
        at various levels; universities could be involved at this level as long
        as a degree was not required as entrance, but would also be responsible
        for the *trainers of the trainers*. Until qualified 'adult educators'
        are available it will not be possible to make much progress in this
        area.

(ii)   To identify facilities and resources that are already in existence –

        (a)   in existing state, industrial and private voluntary agencies, so
              that greater co-ordination and effectiveness can be achieved:

        (b)   in the formal education system, so that these could be used for
              adult education purposes.

(iii)   To draw up a curriculum with the appropriate formal certification (at
        the equivalent standards of about Std 2 and Std 5) for basic education
        relevant to the needs and interests of the adult (and particularly the
        young adult).

2.1.6.4 Composition

(i)   Chairman   )
        Vice-Chairman) initially to be nominated by the SA Council for Educa-
        tion, thereafter to be elected by the Permanent Committee itself.

(ii)   Representatives of employers (commerce, industry and agriculture).

(iii)   Representatives of employees (trade unions, staff associations, etc.).

(iv)   Representatives of voluntary agencies (literacy, adult education, com-
        munity education, self-help groups, etc.).

(v)   Representatives of departments (centres, units, etc.) of adult (con-
        tinuing) education at universities and technikons.

(vi)   Representatives of the teaching profession, particularly of those con-
        cerned with adult education.

(vii)   Representatives of those concerned with 'training' in the private sec-
        tor.

(viii) Representatives of middle-level interests, elected from committees for
        adult and non-formal education.

(ix)   One representative from each of the following:

        National Training Council
        Manpower Commission
        Permanent Committee for Curriculum and Examinations
    o   Council for Educational Research and development.

        (Note:
        (a) each group from above (paragraphs (ii) to (viii)) would consist of
             about 3 to 4 members;

        (b) the executive of the Permanent Committee would be composed of the
             chairman, vice-chairman and one member from each of the groups
             (ii) to (viii) making nine in all;

        (c) The secretariat would be provided and set up by the chief execu-

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tive officer of the SA Council for Education;

(d) the head of the section responsible for adult and non-formal edu-
     cation within the *central* (first level) department would attend
     all Permanent Committee and executive meetings.)

.1.7   South African Teachers' Council

.1.7.1   Preliminary observations

i)   Two basic models have been proposed:

(a) Separate councils for White, Black, Coloured and Indian teachers,
     with an overall Co-ordinating Teachers' Council establishing mi-
     nimum norms and criteria only, but guaranteeing considerable
     autonomy to the separate councils, with all the implications that
     follow on this. (The most direct exposition of this model is
     contained in a memorandum from the South African Teachers' Coun-
     cil for Whites of 26.2.1981: Die Plek van 'n Professionele Raad
     in die Suid-Afrikaanse Onderwysstelsel.)

(b) One Teachers' Council for all teachers in South Africa, with spe-
     cial arrangements (associate membership, conditional registration,
     for example) for the many teachers at present who would not be
     able to satisfy the basic requirements, open to all teachers in
     whatever school or institution they teach (this would therefore
     include private schools).

In relation to the overall pattern proposed for a new education manage-
ment structure, it is the second of these models which has been built
in to the support system for the suggested SA Council for Education.

)   Although the proposed South African Teachers' Council will be one of
     the major bodies serving an advisory and consultative function in
     relation to the SACE, it is nevertheless important that it should also
     have direct access to the Minister and Department of Education on mat-
     ters of direct concern to the profession. Its independent position
     should also be established by the maintenance of a separate, indepen-
     dent secretariat, responsible solely to the SATC.

(iii)   As middle-level education authorities are set up, the proposed SATC
          would be represented, together with the teachers' professional asso-
          ciations, on the middle-level colsultative committees.

2.1.7.2 Functions

In addition to those functions at present established for the SATC for
Whites, which under the new proposals would be extended to cover all
teachers, consideration should be given to an extension of function in
the following directions:

(i)   to establish on behalf·of the profession, minimum standards for the
          education and training of teachers, and to advise the minister on these
          matters through the SA Council for Education;

(ii)   to consult and liaise, through the Permanent Committee for Tertiary Edu-
          cation, with the various institutions responsible for the education
          and training of teachers;

(iii)   to advise, consult and negotiate with the Minister of Education on
          matters of direct concern to the profession, and in particular matters
          relating to salaries and conditions of service.

          In matters of more general educational concern consultation would take
          place with and through the SA Council for Education.

2.1.7.3 Composition

(i)   In broad outline there are four main groups that should be represented
          on the SA Teachers' Council:

          the teaching profession, in all its various facets and at its differ-
          ent levels;

          the education authorities, agencies and institutions employing teach-
          ers (including private schools);

          the institutions responsible for the education and training of teach-
          ers;

          broad community interests representing the 'consumers' of education
          (compare lay representation on the SA Medical and Dental Council).

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(ii)   Within this broad composition the teaching profession should remain
         the dominant group. In this regard the *weighting* of interests within,
         for example, the General Teaching Council for Scotland are of rele-
         vance. The amendments of 1970 would seem to suggest that 30 out of
         the 49 members are directly representative of the teaching profession.

(iii)   It should also be noted that the Secretary for State of Scotland has
         the right to appoint two *assessors* from his department who can parti-
         cipate fully in all activities of the Council, but have no vote and do
         not become involved in the concerns of the Disciplinary Committee. A
         similar provision in regard to the SA Council for Education and the
         Minister of Education in the South African situation should prove to
         be of value.

2.1.8   Council for Educational Research and Development

2.1.8.1 Because of the constraints laid upon it by having to report by the end
         of June 1981, the present investigation will necessarily leave con-
         siderable *unfinished business*. There are many areas requiring more
         detailed research. Moreover there is no final solution for education-
         al problems: education is a dynamic process and if it is to maintain
         a sensitive, relevant response to new needs and changed circumstances
         continuing research and development will be imperative. The results
         of such research need to be brought to the attention of the decision-
         makers in a form that makes them accessible and of application to the
         issue under review. A regular flow of research information (including
         statistics) to both planners and decision-makers is therefore an essen-
         tial component in the renewal of education.

         It is also imperative that a general education data bank should be
         established and kept up-to-date, so that information on any aspect of
         education is readily available.

2.1.8.2 Research is undertaken by many agencies, principal among them the uni-
         versities, but the information flowing from such research is slow to
         penetrate education systems. The purpose of a research council is
         not only to co-ordinate such research but also to ensure that it is
         communicated effectively to the potential user.

2.1.8.3 It is possible that the present Human Sciences Research Council,

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through its Institute for Educational Research, could fulfil both these functions, but consideration needs to be given to the following issues:

(i) Education will prove to be such a major issue in the years ahead that there is an argument for a much more specialised, strengthened research institute with its own physical identity and separate location. Because of the social, economic and political *surround* of education, such a research institute should have as autonomous an existence as possible, comparable with that of a university.

(ii) The governing council of such an institute, in contrast with the advisory committee of the institute of the HSRC, needs to be much more widely representative of

(a) all the inhabitants of South Africa;

(b) the various sectors concerned with education.

(iii) In the light of these considerations it is proposed that the Educational Research Council, which, while having an independent existence, will prove to be one of the main support bodies linked to the SA Council for Education, should be composed of representatives of the following interests:

Chairman	: elected by the Council
Vice-Chairman	: elected by the Council
The universities (4)	: nominated by the Committee of University Principals (two of the representatives at least should be from departments/faculties of education)
The technikons (2)	: nominated by the Committee of Technikon Principals
Teacher education (2)	: nominated by the Committee of Heads of Colleges of Education

The SA Teachers' Council (1)
The teachers' professional associations (2)
The middle-level education authorities (3)
Private sector interests (2)
The Permanent Committee for Curriculum and Examinations (1)
The Permanent Committee for Adult and Non-formal Education (1)

The Human Sciences Research Council (1)

The SA Council for Education (1).

2.1.9   Department of Education
(following the one-ministry model)

2.1.9.1   Preliminary considerations

(i)   The proposal implies that the Department of Education and Training
would cease to exist and that its functions would be taken over by the
new Department of Education (and by middle-level education authorities)
as would the present education functions of the Department of Internal
Affairs. Transitional arrangements to achieve this objective are dis-
cussed in a later section of this report.

(ii)   In the process of reconstruction it is important to make the maximum
use of existing structures, facilities and resources. It is therefore
proposed that the existing base of the Department of National Education,
which already serves some of the proposed functions of the new depart-
ment, should be used and restructured.

(iii)   From the research reports and memoranda submitted to the HSRC Investi-
gation there have emerged two main ways of carrying out this recon-
struction:

        (a) The first, while accepting the need for co-ordination and common
             control at the highest executive level, then structures the de-
             partment on an ethnic basis, with deputy directors-general respon-
             sible for divisions concerned with the education of specific popu-
             lation groups.

        (b) The second, while accepting that individual and group needs may
             well differ and accepting that educational differentiation is a
             soundly based principle, structures the department on the basis of
             common educational function in order to achieve an effective im-
             plementation of broad, common national education policy for all
             the inhabitants of South Africa, leaving diversity to be catered
             for at lower levels of management.

(iv)   Apart from the consideration that the first alternative does not re-
flect the spirit of the principles, objectives and criteria guiding the

work committee in its deliberation it has to be accepted as hard fact
that it would be perceived by the great majority of the inhabitants of
South Africa as fundamentally a continuation of the present separation
and segmentation of education and as such would have no acceptance or
legitimacy among them. It would be seen as a device, in essence, to
maintain the status quo. It is the second alternative, therefore,
which is pursued in this presentation.

(v)   In the reconstruction of the present Department of National Education
        and the structuring of a new department on this basis, there are a num-
        ber of important practical considerations:

        (a) The present ministry and department have divisions dealing with
             culture and sport. The increased importance and responsibilities
             of the new ministry and department would justify education being
             the sole political and executive function. In this case a new
             home would need to be found for culture and sport, particularly
             the latter.

        (b) It is important that the proposal for one ministry, one department
             should not be seen in isolation from the equally important propo-
             sals for substantially independent middle-level education author-
             ities and the much greater authority of school governing bodies at
             the local level, together with freedom of parental choice, dis-
             cussed later in this report. The very real dangers of too great a
             concentration of bureaucratic power in a central department must
             not be ignored: the two protections suggested are strong; statu-
             tory consultative machinery, as widely representative as possible,
             surrounding the central department; secondly, the guarantee of
             the greatest possible authority at middle and lower levels of
             management in the education system.

        (c) In terms of education function the present department has certain
             direct responsibilities for pre-tertiary education, particularly
             in the field of 'special' educational institutions. For a number
             of reasons, some historic and others concerned with co-ordination
             and the development of scarce resources, it may well be advisable
             for these 'special' institutions to continue to be under central,
             first-level control, certainly in the transitional, short-term
             period.

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2.1.9.2 Basics of the structure of the department

(i)   The functions and responsibilities of the new department would be of
two main kinds: direct and indirect. While, clearly, neat and tidy
compartments are not always possible or advisable, the direct functions
and responsibilities would be those assigned to the first or central
level of education management (and therefore not the responsibility of
the second-level education authorities in a direct sense), while the
indirect would, in the main, be concerned with monitoring, accountabi-
lity, advice, support, provision of specialist services, etc. with re-
spect to those functions and responsibilities assigned to the second-
level education authorities. The purpose of the latter would be, in
very general terms, to ensure that -

the broad, agreed national education policy would penetrate throughout
the country to the benefit of all its inhabitants;

public monies and resources were being sincerely used at all levels to
create a situation of equal opportunity and to achieve equal standards
in education, with due regard to differentiation on purely educational
grounds, throughout the system.

(ii)   The Department of Education would have direct responsibility for:

    (a) Tertiary education matters, in which it would work in close co-
        operation with -

        the Permanent Committee for Tertiary Education
        the three consultative committees and the three committees of
        principals.

    (b) The South African Teaching Service, in respect of which it would
        maintain close and constant contact with the SA Teachers' Council
        and the teachers' associations.

    (c) International education relations, which would include professional
        assistance to and liaison with Transkei, Bophuthatswana and Venda
        (later Ciskei) in order to help them to achieve similar standards
        and provide similar educational opportunities to those being aimed
        at in South Africa. In this it would be advisable for the Depart-
        ment to work in consultation with a committee of education heads
        from these states.

(d) National level examinations, where these were maintained as at present or newly instituted.

(e) Control and supervision of *special* educational institutions.

(iii) Among the Department's <u>indirect</u> responsibilities would be:

(a) Monitoring the maintenance and development of national policy (as in 2.1.3.1(i) and (ii) of the functions of the SA Council for Education), providing advice, support and specialist services in the fields of pre-primary and primary education at the middle level.

(b) Similarly for all facets of secondary education, including technical, commercial and general vocational.

(c) Similarly for all facets of adult and non-formal education, in close co-operation with the Permanent Committee for these aspects of education. In this field, because of the need for negotiation and planning at the national level with country-wide organisations, national employers' associations and trade unions, etc. there would be a more direct involvement of the Department.

These functions would be exercised in respect of technical and professional assistance to the non-independent national states (homelands) as well as to all other middle-level education authorities.

(iv) The internal organisation structure of the Department should be based upon these functions and responsibilities. Because many of them are new to the present Department of National Education, additional staff with expertise in these areas will have to be appointed from departments being replaced and from other agencies. In doing this every effort should be made to create a staff as widely representative of South Africa as possible, *not to create a presence of an artificial nature, but to build in the experience, understanding and expertise it would urgently need in facing its new task. The department must not be seen to be run by a White bureaucracy – however well intentioned – that makes decisions affecting the lives of children and adults in other sections of the community.* Particular care would have to be taken in the selection of those advisers who would be working closely with second-level education authorities: they would need to be of the calibre and with something of the independence of Her Majesty's Inspectors in England.

ONE MINISTRY   -   ONE DEPARTMENT

M I N I S T E R

DEPARTMENT

CONSULTATIVE MACHINERY

"THE AGENT OF CHANGE"
SOUTH AFRICAN COUNCIL FOR EDUCATION

Chief Executive Officer
Secretariat, Planning, Finance, etc.

'DIRECT' FUNCTION

Independent

Constituent

1. Tertiary Education
2. External Education Relations
3. National Examinations
4. 'Special' Educational Institutions
5. The SA Teaching Service

COUNCIL FOR EDUCATIONAL
RESEARCH AND DEVELOPMENT

PERMANENT COMMITTEE FOR TERTIARY
EDUCATION

Consultative Committees

Committee of Heads of
Education Departments:
Independent States

University Education   Committee of U. Principals

Technikon Education   Committee of T. Principals

SA TEACHERS' COUNCIL

Teacher Education   Committee of Principals of
Teacher Education
Institutions

'INDIRECT' FUNCTION

SA Teachers' Association/s

Monitoring, advice, support, provision
of specialist services at pre-tertiary
level to middle(second) level education
departments, including adult, non-
formal education

PERMANENT COMMITTEE FOR CURRICU-
LUM AND EXAMINATIONS

Curriculum Unit

Committee of Heads of
Education Departments:
Middle(second) level

PERMANENT COMMITTEE FOR ADULT
AND NON-FORMAL EDUCATION

NOTES

(a) The chart indicates only major
functions and consultative links.

(b) There is a strong interrelation-
ship among the various main
consultative bodies.

(c) Chart can be developed further
after input by other work
committees.

(d) 'Constituent' indicates bodies
served by the secretariat of
the PCE.

KEY

Bodies indicated by single-line boxes,
as also bodies/functions underlined,
indicate an existing base which could
be extended or developed to meet the
needs of the new dispensation.

All others are new bodies/functions.

2.2.1 Introduction

(i)   One of the most difficult areas of operation for the work committee has
        proved to be that of proposing structures and processes of education
        management that would satisfy the demands of two of the basic principles.

        (No. 2):

        *Education shall afford positive recognition of what is common as well
        as what is diverse in the religious and cultural way of life and the
        languages of the inhabitants.*

        (No. 9):

        *In the provision of education the processes of centralization and de-
        centralization shall be reconciled organizationally and functionally.*

        In the continuum centralization-decentralization, the recognition of
        what is common at the first (central) level and of *what is diverse* at
        the third (local) level is an issue on which there is a large measure
        of agreement. The reconciliation of, and the meeting ground for, the
        two factors has proved to be much more difficult. In seeking this *meet-
        ing ground* at the second (middle) level of management, consideration
        has been given to such factors as -

        the need to avoid an over-concentration of centralized bureaucracy at
        the first level;

        at the same time to provide *management units* that will be both efficient
        and effective in scale in co-ordinating the educational activities of
        schools and institutions, and in maintaining standards, administering
        finance, etc;

        and yet that will allow of education remaining *close to the people* so
        that participation and involvement are possible, specific needs can be
        accommodated and possibilities of conflict are minimised;

        but will also ensure that broad national policy in terms of equality of
        opportunity and standards is capable of being implemented.

        Within these broad considerations the basic standpoint of the work com-

mittee is that an attempt should be made to achieve the greatest degree of decentralization possible and that the *users* of education should be involved and participate through consultation and negotiation in education decision-making at every level.

(ii) . A study of the present situation with regard to second (middle) level education authorities (provinces, homelands, regions in Black education, etc.) shows very clearly that what advisory committees do exist have minimal influence on the running of these departments. Both teachers and parents (as also wider community interests) in memoranda submitted to the investigation have clearly expressed the need for more effective machinery to enable them to give expression to their democratic rights in terms of the *need to know* and to be consulted before important decisions are taken. The protection against authoritarianism at the second(middle) level is a strong education council of the kind proposed later in this section.

(iii) In terms of present constitutional arrangements there are two *problem areas* that have had to be considered by the work committee in making proposals for new approaches to education management at the second (middle) level, particularly in the shorter term. The first of these is the constitutional position of the existing *provinces*, not only in terms of geographical definition and administrative function, but also in terms of specifically allocated education functions. At the same time it needs to be noted that, historically, the geographical definition has been drastically changed with the setting up of both *independent* and *non-independent* national states (homelands), and that the education function has been restricted(through state action in the 1950s and 1960s) to White education. There are, therefore, precedents for change in the status of provinces in both these areas.

(iv) The second very real issue is the existence of separate education departments in the homelands and their relation to the *regional* concept. Are they to be regarded as ready-made *regions?* Little attention is given to this in any research report. There appear to be two conflicting assumptions:

    (a) they are to be regarded as a *fait accompli* and not to be touched;

    (b) they are to be disregarded as entities when new middle-level authorities are established.

There are homelands working towards *independence* and also those (such as KwaZulu, Gazankulu) that see themselves as an integral part of new South African political and constitutional dispensations. There has been no input to guide us on their wishes as far as *middle-level* education authorities are concerned. Until there has been an expression of opinion from the people and their leaders it would appear that the only practical proposal would be to regard the homelands as fully constituted middle-level education authorities with all the rights and privileges of direct relationships with a central, unified state department of education.

(v)   There would also appear to be need for specific and flexible arrangements, peculiar to the area concerned, to be made in the case of metropolitan urban areas, as defined in the National Physical Development Plan of 1975:

The Pretoria-Witwatersrand-Vereenging complex
The Cape Peninsula
The Port Elizabeth-Uitenhage complex
The Durban-Pinetown-Pietermaritzburg complex.

(vi)   Attention is also drawn to Appendix I, *Some Thoughts on the Criteria for Delimitation of Educational Regions,* Tomlinson and Drake, in which the theoretical considerations underlying the development of *regions* are discussed.

(vii)   Finally, it is clear to the work committee that in the limited time at its disposal it has not been able to explore sufficiently deeply the issues of education management at the second (middle) level, and in particular the complex relationships with both the central and local levels. These will require further investigation and discussion among the interests concerned. The work committee has therefore concentrated on broad recommendations and on creating consultative machinery and *starting points* for further development.

2.2.2   Some second-level options

The following are some of the options that have been suggested or are implicit in documents submitted to the investigation. They are listed seriatim, with short comment on each.

(i)   The maintenance of the present systems in the provinces and national
        states (homelands) with <u>deconcentration</u> of administrative and executive
        functions to the present regions set up by the Ministries of Education
        and Training (Black education) and of Internal Affairs (Coloured and
        Indian education).

        The assumption made is that the control of Black education will continue
        to be exercised by the Department of Education and Training and that
        over Coloured and Indian education by the Department of Internal Af-
        fairs. Under no circumstances will this be acceptable to the *clients*
        of these existing subsystems.

(ii)   A return to the position in the mid-1950's when all groups were catered
        for by the provincial education systems, with the new situation as far
        as the national states are concerned.

        The option suggested must be taken seriously, but at the same time
        weighed against the reservations that have been expressed about the vi-
        ability of the existing provinces as educational units even for White
        education alone; it must also be noted that provinces are White-domi-
        nated political units. (See Louw, 1981, a, p. 28).

(iii)   A new middle-level dispensation for White education (replacing the pre-
        sent provincial systems), with *devolution* of authority to distinct
        middle-level organisations for Indian, Coloured and Black respectively.
        White, Coloured and Indian regional authorities would link up with a
        new Ministry of National Education, Black regions with the Ministry of
        Education and Training.

        The assumption underlying this is the constitutional direction indi-
        cated by the setting up of the President's Council - a *grouping* of
        White, Coloured and Indian on the one hand, with a separate dispensa-
        tion for Blacks - leading to divided control of education between two
        ministers, instead of three, as previously. (Whatever solution is
        sought it is difficult on any grounds to justify the control of educa-
        tion falling under a Minister of Internal Affairs.)

(iv)   Devolution of authority to separate middle-level authorities for White,
        Coloured, Indian and Black education, with strong co-ordinating machin-
        ery, and all linked to one central state department of education.

This option assumes a clear acceptance of *gemeenskaplikheid* at the first level, as also the need for strong co-ordination in the common interest at the middle level, but proposed a formal separation of structures for the provision of education to the various population groups. The danger inherent in this proposal is rejection by all but the White group on the grounds that existing separate systems will be perpetuated in spite of the change in structure at the first level. What will be of vital importance if this proposal is to be considered, even as a transitional phase, will be the degree of devolution of authority to be *middle-level education council* and the level of decision-making and the control over resources that the representatives of the group concerned will be allowed to exercise.

(v)   The establishment of *regions* according to geographical, demographic and economic criteria, rather than criteria associated with race or ethnicity. All schools in the region would fall under a common education authority. The response to diversity of language, religion and culture would be at the school level, in local groupings of schools, at which level parents would be enabled to exercise freedom of choice.

The assumption implicit in this option with diversity and freedom of choice exercised only at the third (local) level, is to place a much stronger emphasis than heretofore on what is common (*gemeenskaplikheid*) and to seek criteria for the identification of regions that have to do with demography, geography, economics and effectiveness, for example, rather than colour or culture. The adoption of this option would also require particularly careful attention to the mechanisms for the recognition of diversity at the third level. (See Stone, 1981, p. 31.)

All the options listed above fall along a continuum the extremes of which are –

on the one hand, the absolute recognition of *group diversity* at the second level as well as at the first (local) level; on the other, the representation at second level of the kind of common, unified control and management envisaged for the first level.

Neither extreme would seem to satisfy the requirements for the *meeting ground* and reconciliation discussed in paragraph 1.2.1(i) and the work committee therefore addressed itself to providing a *practicable* alter-

native that would do this, particularly in the shorter term. In doing
this it made use of components of various of the above options.

2.2.3 A second-level management proposal

(i)   The core of the proposal is that the *province* in its geographical de-
        finition, not in terms of its present administration of education,
        should be used as the basis for the middle-level unit of educational
        management; with the proviso that those *non-independent* national states
        that so decided should also have the status of education *regions* under
        the new dispensation. This would perhaps bring into being about eight
        or nine education *regions* at the second level.

(ii)   As some of these *regions* would be large, both in terms of area and of
        school enrolments, provision could be made where necessary, and under
        very flexible arrangements, for *subregions* as part of middle-level
        education management. This procedure, for example, might be adopted in
        the case of the metropolitan urban areas (see 2.1.5) to meet their parti-
        cular needs, or in the case of an education authority such as KwaZulu
        which has a school enrolment of over 850 000. The *subregion* might also
        be used as a transitional arrangement in the short term in order to
        create machinery for the absorption of existing regional organisations
        from Education and Training and from Internal Affairs into the new
        middle-level education authorities.

(iii)   The longer-term objective within middle-level education authorities
        would be for *school districts* to evolve from the local level, reorgan-
        ised on the basis of expressed common interests, co-operative associa-
        tion etc. as a result of negotiation between consultative bodies at
        both local and *regional* levels. This is not something that can either
        be planned in detail or imposed by central authority. What is impera-
        tive, however, is that, as at the first level, enabling machinery must
        be brought into being to create a negotiating ground for all the in-
        terests concerned.

(iv)   For this reason, the work committee attaches the same importance to the
        REGIONAL COUNCIL FOR EDUCATION (or like body, e.g. in the homelands) at
        the second level as it does to the SA Council for Education at the first
        (central) level. It believes also that it is equally important to have
        strong consultative bodies of teachers and community interests at this

level of education authority. Only in these ways will effective in-
volvement, participation and negotiation of future arrangements be made
possible for all the people in the region.

(v)   The work committee's judgement is that the alternative sketched above in
        very broad, flexible terms goes far, particularly in the shorter term,
        to satisfying the immediate demands of the principles and factors out-
        lined in paragraph 1.2.1(i). Longer-term objectives and arrangements
        must crystallise from continuing discussion and negotiation among all
        the people of the region or subregion.

2.2.4   Proposed management structures at the second level

2.2.4.1 In summary, education management at the second (regional) level is
        based on:

(i)   A Regional Education Authority, composed of a Regional Council for Edu-
        cation, representative of all interests in the region, with specific
        authority over all non-tertiary education in a defined geographical
        area; and a regional director of education who, with his staff, would
        be responsible for the implementation of education policy and for the
        administration of education in the region.

(ii)   In support of the Regional Education Authority there would be three
        bodies:

        A Regional Committee for Curriculum and Examinations
        A Regional Committee for Adult and Non-formal Education
        A Regional Education Planning Unit.

(iii)   At the subregional level, where such arrangements were made, the re-
        sponsible education authority would be supported by two major consul-
        tative bodies:

        the first representing the organised teaching profession;
        the second representing broad community interests.

2.2.4.2 Apart from the Regional Education Authority itself no attempt is made
        to spell out the functions and composition of the other bodies in any
        detail. Allowing for regional needs and differences they could well

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follow the kinds of patterns established for similar bodies at the first
(central) level. However, whatever regional option was applied in prac-
tice, or whatever the processes of change in moving from one to another,
there would be need in any new education dispensation for:

(i)   some form of <u>Regional Committee for Curriculum and Examinations</u> to ensure
          that broad guidelines from the national (first) level were developed and
          adapted to regional needs, and that examination standards were maintain-
          ed in whatever schools were the responsibility of the particular kind of
          second-level education authority;

(ii)   some form of <u>Regional Committee for Adult and Non-formal Education</u>,
          given the critical importance of this in the total provision of educa-
          tion (see Louw, 1981.a, p.26 - 7) and the need for close liaison with
          industry, commerce and agriculture in the areas for which the second-
          level education authority is responsible;

(iii)   some form of <u>Regional Education Planning Unit</u>, particularly in the
          light of the undoubted expansion in and improvement of facilities in
          most communities in South Africa, that will result from the applica-
          tion of the principle of equal opportunity and equal standards.

2.2.4.3   The functions of the Regional Education Authority

(i)   Responsibility for the provision of education, in a particular defined
          area, that will be relevant to the needs of the individual and of so-
          ciety (including economic development) in that area, and will be of a
          quality capable of serving these needs.

(ii)   To carry out the overall education policy established for all the in-
          habitants of South Africa by the Ministry of Education in consultation
          with the SA Council for Education, in the area of its jurisdiction, as
          far as pre-tertiary formal education and all non-formal education are
          concerned.

          (Note: In the short term teacher-training would require special con-
          sideration: pre-tertiary levels might continue as a regional responsi-
          bility or be placed under university *supervision* as an interim measure.)

(iii)   Within this general responsibility for the provision of education in the

region it would in particular ensure that all *schools* under its autho-
rity were treated without discrimination and that national programmes
aimed at the development of equal opportunity and equal standards for
all were implemented.

(This would be one of the main responsibilities of the Regional Planning
Unit.)

(iv)   Responsibility for the financial management of education in the region:
the preparation of financial estimates, the management of the approved
budget and the allocation of financial resources to the educational in-
stitutions under its control.

(v)   The maintenance and establishment of schools and educational programmes,
both compulsory and voluntary, formal and non-formal, within the broad
policy directives of the Ministry and Council.

(vi)   The appointment and payment of professional, administrative and support
staff according to criteria laid down by the Ministry for salary and
other conditions of service. In regard to the appointment of teaching
staff the greatest possible autonomy should be exercised by local
governing bodies. (See notes on management at the local level.)

(vii)   The establishment (within the broad national guidelines suggested by
the Ministry) of regional curriculum requirements, to be implemented
flexibly in the schools through advice from and consultation with the
Regional Curriculum Unit. (See notes on curriculum at the level of
local governing bodies.)

(viii) The maintenance and improvement of educational standards and the control
of regional-level public examinations.

2.2.4.4 The Regional Council for Education

In terms of the functions allocated to the Regional Education Authority,
the Council would exercise advisory and consultative powers in relation
to each, of the kind guaranteed at the central level to the South
African Council for Education. Inter alia it would have the right to
be consulted before policy decisions were taken, to initiate policy at
the regional level, to take decisions on the allocation of resources in

the region, to monitor administrative action in the region, particularly in the area of equal opportunity and equality of standards, and the implementation of broad, national policy in the region.

2.2.4.5 As far as its COMPOSITION is concerned the Regional Council should be broadly representative of all the inhabitants of the region, with particular reference to parents, the teaching profession, religious, cultural, community and economic interests. In more detail a possible composition of the council might be as follows:

Chairman and Vice-Chairman: elected by the Council at its first meeting. (Should it be necessary to set up an interim Regional Council, they could be appointed by the SA Council for Education in the transition period.)

Members: The chairman (and one additional representative) from the consultative committees of community interests and of teachers from each subregion/or *school district* (whichever is applicable).

The chairmen of:

Regional Committee: Curriculum and Examinations.
Regional Committee: Adult and Non-formal Education.

Two representatives of regional trade union interests.
Two representatives of employers' organisations in the region.
Two representatives of the private schools in the region.
Five additional members of whom two must be women, nominated from the region concerned by the SA Council for Education, to ensure that the Regional Council fully represents the diversity of the region.

2.2.4.6 Executive committee

Because of the probable size of the main regional authority it will be necessary to have an executive committee that can meet frequently and at short notice. It will also have to carry the major burden of responsibility. It is suggested that its composition should be along the following lines:

Chairman
Vice-Chairman

Chairman: Regional Committee, Curriculum and Examinations
Chairman: Regional Committee, Adult and Non-formal Education
Two representatives: consultative committees, teachers' interests
Two representatives: consultative committees, community interests
Three additional council members.

2.2.4.7   The regional director of education and the head of the planning unit
would be in attendance at all meetings of the Regional Council and exe-
cutive. Other officers, such as the heads of education authorities in
the subregions, would attend when necessary. The secretariat would be
provided by and under the control of the regional director.

2.2.4.8   Some organisational matters

(i)   The chairman and vice-chairman will have to be prepared to give con-
siderable time to the affairs of the regional education authority, par-
ticularly in the first few years; this factor should be taken into con-
sideration at the time of their election; and their official allowances
should be such as to allow them to do so.

(ii)   The chief executive officer of the region will be the regional director,
who should be a professional educationist. He would be appointed by the
central department, on the advice and with the consent of the SA Council
for Education, acting in consultation with the Regional Council. His
civil service rank and the staff allocated to the region will depend on
its size (number of schools, pupils, etc.) and will be determined by
criteria laid down by the Ministry. The Regional Planning Unit is a
vital component and its head should hold a rank just below that of the
regional director.

(iii)   The professional and other staff of the region should be representative
of the *make-up* of the region. Staff development programmes should be
undertaken to ensure that the presently *disadvantaged* groups have more
than *token* representation. Staff should be allocated according to edu-
cational rather than ethnic function.

(iv)   There will clearly be a special relationship between the section re-
sponsible for adult and non-formal education and the regional committee
to be set up for this purpose. This area has been *lifted out* and iden-
tified because it is new and vital to the solution of educational pro-

blems over the next twenty years.

(v)   The first step in the setting up of a new Regional Education Authority
        would seem to be the establishment of an _interim_ Regional Council (as
        near as possible in composition to that suggested in 2.2.4.5), the
        appointment of a regional director, the head of the planning unit and a
        very small core staff representative of the various groups in the re-
        gion in order to plan and organise the new regional management struc-
        ture.

2.2.4.9 A note on the _circuit inspector_ in relation to education management at
        the level of the region and subregion:

        In terms of the practical administration of education in South Africa
        the so-called _circuit.inspector_ has been a key figure. In the new dis-
        pensation he will continue to be a critical link in management processes
        and his _management style_ could well be decisive in facilitating accept-
        ance of change and innovation. The suggested new nomenclature - circuit
        education officer - is more than just a new name; it is suggestive also
        of a change in basic function, of management by support and advice, as
        a communication link between schools and region, rather than _inspection_
        as such. The method of incorporating the present _inspectors' corps_ into
        any new dispensation and the degree of their commitment to it will prove
        decisive for success and acceptance at the school level.

2.3   THE THIRD (LOCAL) LEVEL OF EDUCATION MANAGEMENT

2.3.1   Introduction

        In terms of the concept of the three _levels_ of education management so
        far developed, and the strong elements of what is common (_gemeenskap-
        likheid_) at both the upper and middle (regional) levels, the mechanisms
        and processes for responding to the diversity of language, religion and
        culture at the school level and in local _groupings_ of schools become of
        major and strategical importance. It is also salutary to remember that
        in the end education takes place in the _classroom_ (defined in various
        ways), in the personal interrelationships of the teacher-learner situa-
        tion, and that all the structures and processes of _education management_
        at central or regional levels, all the administrative arrangements and
        organisational procedures, exist in order to enable the _teacher_ to serve
        the needs of the individuals with whom he works and of the society from

which they come, so that these needs may be met by education which is relevant and of the best quality possible. There are, therefore, strong arguments for giving the greatest possible degree of autonomy to the in-stitution that is nearest to both parents and teachers, the *school*. A rational analysis of existing systems brings out clearly the need for a much greater input (*inspraak*) and share in decision-making at the school level on the part of both parents and teachers. While it must be accepted that there may well be tensions between the two groups the participation of both is imperative and must be a priority considera-tion in *education management* at the local level.

Inter alia, some of the main issues at this level seem to be –

(a) flexibility of the concept of *community*;

(b) freedom of parental choice;

(c) what are the methods of creating options;

(d) the appointment of teachers;

(e) decisions on curricula;

(f) free associations of schools.

2.3.2 *Community*

(i)   Within *the region* there are geographically defined *communities* ranging from groups of farms, small villages, country towns, mines, urban sub-urbs, to complexes such as Soweto or Sebokeng, for example. The di-versity of *local* situation is such that considerable variety in approach will be necessary in deciding on the *local* management of schools. (It should be noted, however, in terms of a common national policy of edu-cation that diversity does not mean division, and variety does not mean divergence.)

(ii)   Historically, *communities* have adopted, sometimes of free will, but more often in recent years under the compulsion of law, a *population group* pattern that will inevitably affect the nature of the school in rela-tion to the community in which it is situated.

(iii)   Nevertheless, within the geographical and *historical* communities, there are other communities (religious, linguistic, *dissident*, non-traditional) whose needs will not be met by a school geared to the geographical, historical community as it exists today. Their needs may well have to be met outside of the geographical context in which they find them-

selves at present. Again, flexibility must be a major consideration at the local level.

2.3.3   Freedom of parental choice.

This has reference to Principle 3, which reads: *Education shall give positive recognition to the freedom of choice of the individual, parents and organizations within society.*

(i)   The problem is to create freedom of parental choice that at the same time

-    is necessarily constrained by the needs of others;
-    creates diversity not division;
-    does not limit the *horizons* of any child;
-    does not inhibit the broad national policy of working towards equal opportunity and equality of standards;
-    does not make unreasonable demands leading to utter *fragmentation* of the education system.

(ii)   Given parental participation in decision-making by due process at the regional level, the regional education authority, interpreting also . broad national policy, would need to protect minorities within communities (and to do this might need to create *regional* schools under its direct control) and to lay down the kinds of options from which, in practice, parents might be able to choose at the local level. It is clear, also, that not all the options would be available in every local situation.

(iii)   It might be useful to indicate what, in practice and in immediate terms, are the kind of options that would have to be considered:

Language based: English medium, Afrikaans medium, parallel medium, Zulu/ Sotho, etc. medium (at junior primary level), for example:

Community (as at present constituted) based: White, Black, Coloured, Indian;

Common, innovatory, *open* schools;

Catholic, Jewish, Muslim, Protestant,denominational schools;

Boys', Girls' and co-educational schools.

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(Types and levels of schools in terms of purely educational function are not under discussion in this instance.)

2.3.4 Methods of creating new options

(i) The first and most *participatory* way of creating options would seem to be to accept as a *working principle* that local school *governing bodies*, acting together with the principal and teachers, should have a major say in deciding on the school's policy on the admission of pupils beyond that laid down by present departmental policy. In other words, admission could not be made more restrictive than at present, but could be *opened* up if the parents, as represented by the governing body, so wished.

(ii) In certain instances it would be the responsible regional education authority that would have to take action to initiate innovatory *open* schools for communities that wished to exercise this choice. Where minorities were concerned, such schools might have to be outside the geographical area of the community, and transport or boarding facilities would have to be available.

(iii) It would seem to be a sound principle to respond, for example, to particular religious needs through the agency of private schools, which subject to fulfilling national education policy in all other ways should be generously subsidised in terms of running costs and teachers' salaries.

(iv) Private schools are in a particularly strong position to innovate in terms of admission of pupils and should be left free to do so without departmental intervention.

2.3.5 Appointment of teachers

(i) The critical issue here would seem to be the balance/reconciliation of the greatest possible recognition of local autonomy with the necessary protection of the teacher's position and professional career opportunities. (The history of Black teachers' experience in relation to local school boards, for example, needs to be noted.) Except in the case of private schools, there would seem to be good arguments for the teacher being appointed by the regional authority, but on the specific recommen-

dation of the local governing body, which should be subject to the scrutiny of a professional review/appeals committee at regional level.

(ii) Any teacher appointed by and through a regional authority would be a member of the *South African Teaching Service* which would have common salary scales, conditions of service, etc. and which would enable the teacher to enjoy mobility from one region to another and give him protection wherever he worked in South Africa. All teachers would also enjoy the protection of, and be subject to the professional requirements of the SA Teachers Council.

2.3.6 Curricula

(i) Another critical area is that of the curriculum. The evidence is overwhelming that both parents and teachers are insistent on a much greater say in what children learn. The basic level at which this must happen is the individual *school*. There is a clear implication that teachers and governing body will have to work together on this, and that the former can no longer regard this as the exclusive preserve of the *professionals*.

(ii) Having said this, however, it is also clear that schools will have to work within the constraints of broad curriculum policy laid down at national and regional levels. They should work in consultation with regional curriculum bodies and will be required to take heed of the standards (evaluation or public examination) laid down as goals for all South African schools.

(iii) Within these constraints, nevertheless, it is proposed that there should be considerable room for flexibility, variety and diversity aimed at education which is relevant to local needs.

2.3.7 Associations (groupings) of schools

(i) In a number of countries the local level of educational administration has close associations with the system of local government. The decision-making mechanisms of local government have been used to express the will of the local community as far as its schools are concerned. This has not been the tradition in South Africa.

(ii)   The question must be asked whether it is a possible model for the fu-
         ture. It is doubtful that, for example, municipal mechanisms could con-
         tribute any sensitive response to the need for diversity (in religion,
         language, culture) at the school level   It must also be noted that out-
         side of the White community local government has at present little
         standing (in the Black community, for example, to link education with
         community councils would be to endanger the acceptance and legitimacy
         of any new dispensation in education).

(iii)   At the local level there will be a need for some form of grouping or
         association of schools in order to provide a unit of management smaller
         in scale than the *region* or *subregion*. The proposed school board or
         local school district would not in the first place be a control mech-
         anism but rather a means of sharing common interests and building up
         co-operative effort. In planning such *school districts* attention would
         have to be given to educational considerations such as, for example,
         the need to provide a complete range of types of secondary school, so
         that the educational needs of children are met. What is important is
         that in the setting up of such groupings the wishes of parents, teach-
         ers and of the community in general should be met to the fullest extent
         possible, and that the principle of *free association* be given its
         rightful place.

(iv)   It is to be expected that to begin with local school governing bodies
         will be stronger and more effective in some areas than in others, and
         it may well be that the regional education authority will have to pro-
         vide forms of support that will enable the weaker bodies to discharge
         their responsibilities effectively. Again flexible approaches will be
         necessary.

2.3.8   School governing bodies

2.3.8.1 Functions

(i)'   To interpret the needs and wishes of the parents and the local communi-
         ty in the field of education and to mediate between them and the pro-
         fessional staff of the school in establishing the character and ethos
         of the school.

(ii)   To support the principal and teachers in their professional task, to re-

spect their professional autonomy in the classroom and to encourage
parents to regard themselves as partners in the task of education.

(iii)   To represent the needs and views of the school and the community in
        which it is situated to the *regional* education authority under which it
        resorts.

(iv)   To take joint responsibility with the principal and teaching staff, sub-
        ject to the broad guidelines laid down by national and regional educa-
        tion authorities and with due regard to the specialist advice available
        for the curriculum of the school.

(v)   To take the major responsibility for the appointment of professional
        and support staff to the school, subject to criteria for appointment
        laid down by the responsible education authority and with due regard to
        the professional advice made available and review processes designed to
        protect the professional status of the teacher.

(vi)   To accept responsiblity for the raising, administration and allocation
        of local school funds, subject only to those provisions necessary for
        the proper control of public monies.

(vii)   To accept responsibility for co-operation with other schools in the lo-
        cal community on matters of common concern.

2.3.8.2 Composition

(i)   Chairman   ) elected by the school governing body from among its
        Vice-Chairman) members (excluding the principal).

(ii)   Elected members from the parents of children attending the school. This
        group should always be in the majority on the governing body. The ac-
        tual number should depend to some extent on the size of the school.

(iii)   A small number (2 or 3) representative of the local community (non-
        parents) and co-opted by the remainder of the governing body, together
        with one representative nominated by the relevant local government auth-
        ority.

(iv)   The principal of the school should be a full voting member, while his

deputy and one other teacher elected by the staff should attend as observers.

(v)   .   The *regional* education authority concerned should have the right, where a need is felt to strengthen the expertise of the school governing body, to nominate up to a maximum of three members.

(vi)   The school governing body will appoint its own secretary, who will not have voting rights.

2.3.8.3 Some further observations

(i)   In terms of practical experience, one of the most productive local bodies has been the parent-teachers association which has often overshadowed the *school committee*. It is to be regretted that the two bodies have often worked in isolation or in parallel. For management purposes, and in order to achieve greater involvement of both parents and teachers, it would be a healthy development for the idea of the parent-teachers association to be seen, particularly in the light of the proposed extended functions of the governing body, as an extension of that body.

(ii)   General meetings of parents will be essential if the governing body, in its mediating function, is to interpret their needs and wishes adequately and sensitively. Certainly, there will be need for an annual *report-back* meeting. When issues such as the curriculum are being discussed there will also be need for full consultation with the parent body and with all the teachers.

(iii)   There should, therefore, be considerable flexibility in the types of meetings held by the governing body, and there should be regular consultations with professionals such as the *circuit education officer* and subject advisers, and where this is relevant with representatives of commerce, industry and agriculture, for example.

(iv)   When sensitive issues are under consideration, such as, for example, a proposed change in the admission policy of the school, not only should this be discussed at a general meeting but the technique of a *confidential* referendum among the parents should also be used.

(v)   It is important that the principal of the school should have a parti-
        cipatory, *community* role in the local management of the school, and
        should not be perceived, as is the case in some of the present systems
        in South Africa, as purely *an instrument of policy*. Education depart-
        ments must not perceive or treat him as an *official*: his first respon-
        sibility is to the children of the community he serves, his second to
        the profession of which he is a member, and only third to the authority
        which pays his salary. *Public accountability must not be confused with
        detailed bureaucratic controls and meddling.* (Ontario Commission on
        Eudcation, 1972.)

2.4   PROPOSALS WITH REGARD TO THE PROCESSES FOR THE INTRODUCTION OF A NEW
        SYSTEM FOR THE PROVISION OF EDUCATION IN SOUTH AFRICA

2.4.1   Introduction

(i)   The proposals that have so far been made in relation to the three-level
        concept of education management have been stated mainly in terms of
        structures, both in order to avoid undue complexity and to provide a
        clear basis for further systems planning. However, the work committee
        has been very conscious of the critical importance of process, and in
        presenting the proposed structures has not neglected to identify some of
        the major *actors* and to discuss their roles and perceptions, particu-
        larly in the areas of decision-making, participation and consultation.
        In terms of process the issue of legitimacy will prove to be the criti-
        cal factor in the implementation of whatever proposals or *models* are
        finally adopted.

(ii)   In its proposals the work committee has attempted to provide machinery
        that, while recognising the external constraints of the political, so-
        cial and economic *surround*, will go as far as possible to satisfy two
        of the major requisites for legitimacy:

        acceptance by the *user* of the authority which establishes the education
        system;

        involvement of the *user* in the decision-making processes within the
        education system itself.

        However, there is no homogeneous category of *user* and there are widely

different perceptions of what is acceptable and what is not, and where authority should rest and where it should not. In terms of the implementation of new policies and systems, therefore, there will need to be a period of *participatory negotiation* in which representatives of all the users are actively involved. In order to achieve this there will be two further requirements:

an effective and representative *negotiating ground* from which further action can emerge;

a positive climate of trust, and acceptance of the sincerity and integrity of government in seeking to implement the basic terms of references given to the HSRC Investigation.

2.4.2   It is the considered judgement of the work committee that the proposed South African Council for Education, together with its related consultative machinery (particularly in immediate terms a reconstituted SA Teachers Council, the Permanent Committee for Tertiary Education and the Permanent Committee for Adult and Non-formal Education) would provide such a negotiating ground. Because of the complexity of its interrelationships with other bodies, for example, at the regional level, there may well be need for an interim council to be set up, but it should be of the nature and strength of the SACE, both in numbers and broad representation. It must be seen as a public body with the right to report publicly on its activities – the servant of the public it represents and not of the minister whom it advises and with whom it consults and negotiates.

(i)   It is of the utmost importance that it should come into being with the utmost expedition, so that heightened expectations raised by the present investigation should not be soured and so that the momentum and public debate engendered in recent months are maintained.

(ii)   At the same time immediate steps should be taken to bring together a multiracial secretariat to serve the SACE and the other consultative bodies, and to do the necessary planning and preparation.

(iii)   The reports of the HSRC Investigation should immediately be placed before the SACE as bases for further negotiation and action.

(iv)   Finally, the financial provisions made by all the existing education
         departments, as at present constituted, should be evaluated by the
         Council (SACE) in the light of the norms established, in order to
         achieve equality of standards so that the recommendations necessary
         could be made to the Minister/s concerned.

2.4.3   In considering what might be done to create a positive climate for con-
         sultation and negotiation there are a number of basic strategies that
         should be given serious consideration:

(i)   In the first place what should be aimed at is process of guided reform
         (not to be confused with *gradualism*) based on phases of implementation
         with specific targets and stated (public) time-scales: this would be
         something very different from promises or statements of intent of a
         general nature. (A model of such phased time-scales is suggested in
         Appendix J.)

(ii)   Immediately, an attempt should be made to move forward in the areas of
         greatest impact, particularly where there is already a positive re-
         sponse to change : an example of this is the area of tertiary education.

(iii)   It would be important, too, to do what could be done, even if it were to
         appear *piecemeal*, rather than to wait for the *grand design* or *master
         plan* requiring major legislation.   In doing this use could be made of
         existing structures, processes and institutions, extending if neces-
         sary their field of operation, so that at least some objectives could
         be achieved quickly.

(iv)   The fourth strategy has in essence been dealt with in Paragraph 2 :
         that is, that a start should be made at the first (central) level of
         management, at the level of broad, common interests, and that partici-
         patory consultative machinery of as representative a nature as poss-
         ible should be created as quickly as possible.

2.4.4   Translating these strategies into possibilities of immediate action the
         following are practical examples of what might be done. In each case
         the roots of the suggestion are to be found in basic longer-term pro-
         posals put forward by the work committee for consideration.

(i)   The first proposal would be the action suggested in Paragraph 2 regard-

ing the South African Council for Education and its related consulta-
tive bodies.

(ii)   Immediate steps should be taken to reorganise the existing Department
         of National Education to enable it to cope with the new dispensation:

         (a) pending the further reorganisation envisaged in this report,
              Coloured and Indian education should be moved from the Ministry
              and Department of Internal Affairs to the Ministry and Department
              of National Education;

         (b) all university and technikon education matters should be placed
              under this Department.

(iii)   While the transfer of *Black education* to the Ministry and Department of
         National Education would be a much more complicated matter both poli-
         tically and administratively, there are nevertheless immediate transi-
         tional steps that could be taken :

         (a) the first has been dealt with under 2.4.4(ii)(b);

         (b) in the second place the South African Council for Education should
              also become the recognised advisory and consultative body vis-a-
              vis the Minister of Education and Training until such time as the
              single ministry comes into being. In the interim period the
              Council's responsibility would be to monitor developments in Black
              education (including any proposed legislation and regulations) to
              ensure that they are not contrary to broad, national policies as
              the latter crystallise and are established for the new dispensa-
              tion;

         (c) as far as non-tertiary education is concerned the Department of
              Education and Training could immediately begin to develop its re-
              gional units into much more independent education authorities, an
              essential component of which would be strong regional consultative
              bodies, in which the regional communities and the teachers' asso-
              ciations had the major place.

(iv)   The development of strong representative consultative bodies at the
         regional level within other existing systems could also be considered,

particularly where the region could be identified as one to be established under longer-term planning.

(v)   The granting of greater autonomy to local school governing bodies is also something that would not need to wait for major planning at either central or regional level.

(vi)   Perhaps most important in terms of impact would be for government to announce two things -

        (a)   that decisions as to the admission of students at universities and technikons would be left to the councils of the institutions concerned and that the ministerial *permit* system would be abandoned. A corollary of this would be that the Committee of University Principals would be extended immediately to include the heads of all universities in South Africa;

        (b)   that all private schools and institutions not in receipt of government subsidies would be left unhindered to make their own decisions on the admission of pupils.

(vii)   The immediate result of the work of the HSRC Main Committee should be a broad acceptance by those communities that up to now have suffered severe educational disadvantages, that there is a genuine intention to bring about a new dispensation in education in the spirit of the original statement of the Prime Minister; that they will be involved in decisions affecting the future direction of education; and that machinery is being brought into being immediately to realise this involvement through consultation, participation and negotiation, before the details and methods of implementation based on general principles and objectives are brought to finality.

2.4.5   Beyond the immediate

(i)   Beyond the immediate steps that have been proposed, which in themselves will not be acceptable to all interests, the field of negotiation will become increasingly difficult and complex. This is perhaps best illustrated by reference to Appendix K at the end of this section, in which the various options suggested or implicit in reports or memoranda available to the subcommittee of the work committee are summarised in very

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brief tabular form. They are presented in the form of a continuum _from_ a largely _status quo_ proposition _to_ the model (Option 7) which has been developed in this report as the objective towards which education management structures and processes should move.

(ii)   In deciding on the area of negotiation there must be particular sensitivity to two factors:

    (a)   The perceptions and aspirations of those sections of South African society which up to now have been _disadvantaged_ in the field of education and whose dissatisfaction with the status quo was one of the main factors which led to the present investigation being instituted;

    (b)   the political power bases, differing vastly in nature and authority, from which the various parties in the consultative and negotiating processes will operate in the present situation.

(iii)   In the future, constitutional change may bring shifts in power relationships, but in the meantime in educational matters there need to be some anticipation of a broader political dispensation that will accommodate the needs, perceptions and aspirations of those members of South African society who are not White. In education the fundamental issue is to do away with the inequalities that are seen to be the result of the separateness and isolation of the systems of education provision as at present constituted.

(iv)   In the light of these considerations and the imperative need to establish the legitimacy of the authority implementing any new educational dispensation it is possible to make the following overall comment on the options in Appendix K:

    (a)   It is extremely doubtful whether Options 1-4 offer any opportunity for acceptance or as bases for further negotiation or transitional arrangements.

    (b)   Given the approach outlined in paragraphs 2.4.1 (ii) to (iv) of this section, and the creation of a positive and co-operative climate of opinion, Option 5 might well be accepted as a basis to work on and a transitional stage in educational development leading to Options 6 and 7.

CHAPTER 3 : SUMMARY

3.1   *EDUCATION MANAGEMENT*

Both its terms of reference, in the context of the Main Committee's
operationalisation of the main themes of the Investigation into Educa-
tion, and the time at its disposal have constrained the work committee
to report in broad, *macro* terms and to adopt a very specific definition
of *education management*, which, for example, has excluded finance and
personnel management. For the purposes of its investigation the work
committee has concerned itself with management as the philosophy and
practice of decsion-making, with all the influences brought to bear
upon this process by

(a)   participatory, consultative and negotiating bodies and procedures;

(b)   the relevance and effectiveness of the research, information and
      planning available to the decision-making bodies.

Its subsidiary concern was control and co-ordination, in which some at-
tention was paid to organisational matters.

Within this management concept, structures, processes, channels of com-
munication and the *actors* involved were all of importance, both in ana-
lysing and evaluating the present situation in South Africa, as well as
for renewal and reconstruction in terms of a new educational dispensa-
tion.

3.2   THE SITUATION TO WHICH THE WORK COMMITTEE HAD TO ADDRESS ITSELF

3.2.1 From the terms of reference laid down by the Cabinet for the guidance
       of the HSRC it is apparent that there was a concern that the system of
       education provision proposed should not only ensure that *equality in
       education for all population groups be attained*, but also that

       the optimum potential of all (South Africa's) inhabitants be realised;

       the quality of life of all its inhabitants be improved; and

       the economic growth of the RSA be promoted and its manpower needs be
       fulfilled.

3.2.2   Implicit in these terms of reference is the perception that the exist-
         ing systems and provision of education were in fact not achieving such
         equality, the optimum human potential was not being realised and that
         the economic and manpower needs of the country were not being met. In
         the background to the Investigation, from among the many criticisms of
         present education systems and policies, it is possible to identify three
         main streams of dissatisfaction:

(i)   The first arises from the lack of skilled manpower at all levels from
         the artisan to top management and is expressed by the representatives
         of industry and commerce and those concerned with the economic develop-
         ment of the country - this dissatisfaction is concerned with the 'quan-
         tity', quality and relevance of education provision.

(ii)   The second comes from the teaching profession, with increasing concern
         being shown by parents whose children's education is being affected by
         teacher dissatisfaction.   This has been the result of the inadequacy
         of consultative and negotiating machinery through which the profession
         could influence decisions affecting its nature, status and future.

(iii)   The third concerns the problems arising from various demographic, so-
         cial, economic and political circumstances which have led to the alien-
         ation of individuals from *the system* and to the schools boycotts of the
         years from 1976 to the present.

3.2.3   Because education does not exist in a vacuum but in certain constitu-
         tional, political, social and economic contexts, it is this third area
         which has had to be of particular concern to a work committee concerned
         with education management. It is a particularly sensitive area because
         it is concerned with decision-making, with the ways in which decisions
         are reached (*participatory consultation and negotiation, communication
         and information*), with the ways in which they are implemented (*control,
         co-ordination, organisation*). It has close links with the *body politic*
         and in South Africa is more than ever complex because in the key area
         of decision-making the great majority of our people have had no 'say'
         or major influence on educational policy decisions taken on their be-
         half by a political power structure in which they have no base from
         which to operate.

3.2.4   The work committee has had to accept that a new dispensation in educa-

tion management cannot stand in isolation and cannot come about entire-
ly independent of marked social, economic, political and constitutional
change. At the same time it could not be constrained by the status quo:
it believes that education as a process has creative as well as con-
serving qualities and has a primary role in supporting change in so-
ciety: it can anticipate and facilitate change. Moreover, while be-
ing as realistic as possible in its assessment of the present, the
work committee has had a duty to set up management structures and pro-
cesses that are consonant with the basic Principles established by the
Main Committee and which will allow of those Principles being realised
in practice.

.2.5   In doing this it has sought to provide machinery at all levels for real
participation, consultation and negotiation among representatives of
all the people of South Africa in decision-making on education policy
and the allocation of resources. If practical content is to be given
to the concepts of *equal opportunity* and *equal quality and standards*,
this common base or meeting ground from which to negotiate further re-
construction and development is an imperative need. If acceptance of
and legitimacy for what is proposed is to be achieved then it is from
such a common base as the SA Council for Education that the process
must start.

.3   THE APPROACH OF THE WORK COMMITTEE

.3.1   Apart from the accumulated knowledge and experience of its own members
the work committee had at its disposal literature and reports on the
educational systems of South Africa and other countries, a large num-
ber of submissions and memoranda from a wide cross-section of bodies and
institutions in South Africa, and research reports specifically com-
missioned for the HSRC Investigation. The latter consisted of:

i)   Two reports, undertaken respectively by Prof. M.B. Steinberg (UCT) and
Prof. J.v.d. Merwe (UOFS), on education management in fifteen overseas
countries with situations relevant to that in South Africa.

ii)   Two reports on education management issues in South Africa, the first
on pre-tertiary education by Messrs F.B. Buckland and O.C. van den Berg
(UCT) and the second on the tertiary level by Dr J.B.Z. Louw (CUP).

TABEL 4.1

In addition considerable use was made of two further research reports
by Prof. H.J.S. Stone (UNISA) and Mrs B.A.J. van Rensburg (UP), which
were commissioned by the Work Committee: Education system planning.

3.3.2   While it is necessary to be extremely cautious in applying overseas ex-
         perience to the South African situation, nevertheless some useful indi-
         cators were identified in the first two research reports. Very briefly
         they are:

(i)   the ultimate purpose of education management is more effective learning
         and teaching;

(ii)   systems of education are part of the social, economic and political
         structure of the country - acceptability and the involvement of the *user*
         are thus essential;

(iii)   the increasingly important *economic* view of education, as an investment
         of the future of the country;

(iv)   if decentralisation is to work effectively the rights and functions of
         each level of management must be clearly defined;

(v)   in a decentralised system there is an imperative need for a firm na-
         tional policy (especially with regard to innovation) and active linking
         and co-ordinating bodies, with cross representation of membership;

(vi)   an innovation strategy, and the structures and processes to carry it
         out, is an essential element in the management of education;

(vii)   the increasingly important role of research, statistical data, planning
         and development.

3.3.3   In the two South African studies, the following were some of the main
         conclusions:

(i)   the education crisis in South Africa is essentially a crisis of legit-
         imacy; this is related to two factors - the acceptance by the *user* of
         the authority which establishes the education system, and the involve-
         ment of the *user* in decision-making processes within the education
         system itself;

(ii)   within the system as a whole there is neither a body specifically es-
         tablished to effect co-ordination at the national level, nor one that
         is responsible for on-going planning at the policy-making level;

(iii)   education is controlled by a cumbersome and extremely complex bureau-
         cratic structure, within which the consultative processes are inade-
         quate and ineffective;

(iv)   while there is considerable decentralisation (*deconcentration*) of ad-
         ministrative authority in terms of structures, the processes are high-
         ly centralised and within the present systems there is little decen-
         tralisation (*devolution*) of authority in terms of decision-making;

(v)   at the tertiary level management of education requires rationalisation,
         which should lay emphasis on the one hand on the autonomy and individual
         character of institutions, and on the other on more effective co-ordi-
         nated management, especially in the use of scarce resources;

(vi)   at this level, too, the mobility and transferability of students between
         tertiary institutions should be facilitated, and the latter should be
         allowed to make their own decisions on the admission of students with-
         out being subject to government permits.

3.3.4   From these background studies the work committee moved forward to a
         consideration of what its proposals should be to bring about reform and
         reconstruction in education management in South Africa. Before any pro-
         posals were formulated, discussed, evaluated and redrafted (the final
         proposals are a fourth draft) four stages of development took place:

(i)   In the first place, the original Cabinet terms of reference were con-
         sidered, and particular attention was paid to the issue of *practica-
         bility*. This led to the work committee giving attention later to such
         matters as

         the issues of efficiency and effectiveness in education management;

         possible alternative systems of management and their acceptability;

         methods of introducing reconstruction in ways that would increase the
         acceptability of change, and in particular to make as much use of
         existing structures and processes as was consonant with achieving a new
         dispensation.

(ii)   Secondly, the *Principles of Education in the Republic of South Africa*
          clearly created the major guidelines for the work of the committee, and
          they were carefully evaluated and grouped in terms of the practicalities
          of education and management. They laid a responsibility on the work
          committee to propose management structures and processes that at one
          and the same time would ensure both

          centralised forms of participation, negotiation, co-ordination and con-
          trol, in which there would be shared decision-making on matters of com-
          mon national policy, the allocation of resources, the teaching profes-
          sion, the broad curriculum, standards and certification; and also

          decentralised patterns that would allow of diversity in culture, re-
          ligion and language, the right of *free association*, the greatest poss-
          ible freedom of choice to parents and to the individual, and the widest
          range of options to meet the needs of the individual at the *school*
          level; and yet that would also ensure *equality of opportunity* and the
          establishment of educational facilities of *equal quality*.

(iii)   Thirdly, in the light of the Principles and also general management con-
          siderations, the work committee built up an outline of evaluative cri-
          teria that could be used in the analysis of education policies, struc-
          tures and programmes. These criteria were of two main kinds:

          basic criteria - derived mainly from the Principles and concerned with
          values such as equity, fairness, equality of opportunity and freedom
          of choice;

          instrumental criteria - concerned with matters such as efficiency and,
          more important, effectiveness in achieving stated goals and objectives.

          Attention was also given to issues such as *the public interest*, public
          responsibility (responsiveness to the expectations of and demands made
          by the general public), and in particular public accountability (being
          answerable for the achievement of objectives and for the flow of infor-
          mation by which performance can be judged).

(iv)   With all this as background the fourth stage was the drawing up of a
          statement of objectives for education management in South Africa based
          primarily on the Principles but taking into account also 3.3.4(i) and

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(iii). It was on these objectives that the final proposals of the work committee were based. As it would be inadequate to try to summarise them, the reader is referred to paragraph 1.3 of the report of the work committee.

3.4   PROPOSALS AND RECOMMENDATIONS

The essence of the work committee's proposals is a three-level pattern of education management with strong, built-in structures and procedures for participation, consultation and negotiation at each level, ensuring that all the people and interests concerned have a *say* and can influence both educational policy and practice:

FIRST (Central) level: at which matters of common policy and practice would be dealt with by a single, central education administration (Ministry and Department) in consultation with a widely representative SA Council for Education and its related consultative bodies.

SECOND (Middle) level: the education authorities at this level would not be mere *regional organisations* of the central authority but would exist in their own right, with specifically allocated functions to fulfil, and would fulfil these functions in consultation with a *regional* council of education and its related consultative bodies.

THIRD (Local) level: at which the basic unit of management would be *the school* (or educational institution of whatever type), in which the most effective response possible would be made to the diversity of culture, religion and language and to the differing educational needs of both children and adults. Parents and teachers would have the greatest possible *say* at this level. Schools at this level would be grouped into *school districts* (or school boards); these groupings would be worked out in consultation with school governing bodies, parents, teachers and the local communities.

3.4.1 FIRST (Central) level

The proposal for a single, central administration of education at this level should not be viewed in isolation but should be seen in the context of the further proposals for management at the middle and local levels. It was the judgement of the great majority of the members of the work committee that a central department, structured in terms of

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education function, most effectively met the need for the implementa-
tion of a common national education policy aimed at *equal opportunity*
and *equal quality and standards*. It was also the alternative which
best responded to a situation in which the great majority of the people
concerned in the negotiating processes leading to decision-making are
not represented in the political structure of which the Ministry is a
part, and where historically, separate ministries and departments have
resulted in *unequal* opportunities, *unequal* resources and *unequal* stan-
dards. It was also judged to be the most practicable in terms of its
acceptance by the widest possible spectrum of *users*. At this level the
principle of unity should take precedence over the balancing principle
of diversity, the needs of which are met at other levels *nearer to the
people*.

3.4.1.1 The South African Council for Education, working in consultation with
the minister and department, is indispensable to the acceptance and
success of this concept of management:

(a) In composition it would be widely representative (not nominated by
government) of all the inhabitants of South Africa, the teaching
profession and *academia*, economic interests (agriculture, commerce
and industry), trade unions, and cultural and community interests.

(b) It would be a statutory body, publicly accountable, reporting re-
gularly to Parliament and seeking to inform all South African in-
terests of its proposals and recommendations in the field of edu-
cation. It would be able to require regular reports from all edu-
cation authorities on the progress of educational reform and re-
construction. It would not be a body *advising* the minister in a
closed situation, but would be open to public scrutiny and finally
accountable to the *general public* it represented.

(c) In terms of function it would have the right to be consulted be-
fore decisions were taken at the political level, the right of
access to the minister to initiate negotiation and recommendations,
the right to evaluate, report and make recommendations on broad
educational policy at all levels; the annual, national estimates
for education and the allocation of financial resources; matters
affecting the teaching profession; research information, planning
and development.

It would have a particular responsiblity for monitoring the pro-
gress of programmes aimed at achieving equal educational oppor-
tunity and equal quality in education. Finally, in co-operation
with its related bodies, it would have authority to establish
broad curricula requirements and common examination standards and
certification requirements.

3.4.1.2 In carrying out these functions and duties the Council would be sup-
ported by a number of more specialist consultative bodies. These would
be of two types: constituent and independent.

The constituent consultative bodies proposed are directly linked to the
Council and would be served by the same general secretariat under the
overall supervision of the chief executive officer of the Council:

(i)   The Permanent Committee for Curriculum and Examinations;

(ii)   The Permanent Committee for Tertiary Education, with three constituent
components:

Consultative Committee for University Education
Consultative Committee for Technikon Education
Consultative Committee for Teacher Education;

(iii)   The Permanent Committee for Adult and Non-formal Education.

(Note: As other work committees report to the Main Committee it may
well be that further permanent committees may become necessary in order
to enable the Council effectively to fulfil its functions.)

The independent consultative bodies, while equally important to the
Council in terms of advice, information and specialist support, are
bodies which because of the nature of their functions must have autono-
my and independence. They are

(iv)   The South African Teachers' Council (as reconstructed to serve all
teachers);

(v)   The organised teaching profession, through the teachers' associations;

(vi)   The Council for Educational Research and Development.

3.4.1.3 It is proposed that the central administration should be based on a restructured Department of National Education. The new central department would have both <u>direct</u> and <u>indirect</u> functions and responsibilities.

Its <u>direct</u> responsibilities would be:

(i)   tertiary education matters;

(ii)   the South African teaching service;

(iii) international education relations, including assistance to and liaison with Transkei, Bophuthatswana and Venda;

(iv)   national level examinations;

(v)   control and supervision of *special* educational institutions.

Its <u>indirect</u> responsibilities would include:

(vi)   monitoring the maintenance and development of national education policy, and

(vii) providing advice, support and specialist services to middle-level education authorities in the fields of:

pre-primary and primary education;

secondary education, including technical, commercial and general vocational;

adult and non-formal education.

3.4.1.4 The work of the SA Council for Education would be so demanding that it is proposed that the chairman and vice-chairman should serve in full-time capacities. Together with the chief executive officer of the Council and the director-general of the central department they would constitute the team (*board of directors*) that would be responsible for the day-to-day direction of the affairs of the Council.

3.4.2 <u>SECOND (Middle) level</u>

This proved to be a difficult area of education management, as in a sense it is the *meeting ground* of what is *common* at the first (central) level and of what is *diverse* at the third (local) level. The complex

relationships linking the three levels will require much more investi-
gation than the work committee, in the limited time at its disposal,
was able to give. It therefore concentrated on broad recommendations
and on proposing consultative machinery and starting points for further
development.

3.4.2.1 After consideration of a number of alternatives, the work committee has
decided to recommend that the *province*, in its geographical definition
not in terms of its present administration of education, should be
used as the basis for middle-level education management, with the pro-
viso that those non-independent national states that so decided should
also have the status of middle-level education authorities. As some of
these authorities would be large, both in terms of area and school en=
rolments, provision would have to be made where necessary, and under
very flexible arrangements, for what might be called *subregions*. This
procedure might well be adopted in the case of the four major metropoli-
tan urban areas. As a transitional arrangement the subregion might al-
so be used as a short term technique to absorb existing regional or-
ganisations of Education and Training and of Internal Affairs into the
new middle-level education authorities.

3.4.2.2 The new type REGIONAL EDUCATION AUTHORITY would consist of:

(a) A Regional Council of Education, supported by -

A Regional Committee for Curriculum and Examinations,
A Regional Committee for Adult and Non-formal Education, and
A Regional Education Planning Unit.

(b) A regional director of education who, with his staff, would be
responsible to the Regional Council for the implementation of edu-
cation policy and for the administration of all education in the
geographically defined area. He would be appointed by the central
department, but on the advice and with the consent of the SA Coun-
cil for Education acting in consultation with the Regional Council.

3.4.2.3 The Regional Council for Education would be representative of all the
inhabitants of the *region*, with particular reference to parents, the
teaching profession, business and economic interests, religious and
cultural interests, trade unions and private schools.

It would be a statutory body, accountable to the *general public* it represented and reporting regularly to the SA Council for Education, on which it would be represented. Together with the Regional Director, who would be required to consult regularly with it, the Regional Council would, inter alia, be responsible for:

the implementation of broad national education policy in the *region* as far as pre-tertiary formal education and all non-formal education were concerned;

ensuring that all schools under its authority were treated without *discrimination* and that programmes aimed at achieving equal opportunity and equal standards were implemented;

financial management of the *region*: budgets and allocations;

appointment of staff (in consultation with school governing bodies) and payment of salaries;

regional curriculum requirements and examination standards.

In addition a major function would be to advise the SA Council for Education on the needs of the region particularly in terms of resources - financial, material and manpower.

3.4.3 THIRD (Local) level

3.4.3.1 The basic standpoint of the work committee was that the greatest possible degree of autonomy should be given to the institution that is *closest* to both parents and teachers - *the school* (as variously defined), and that parents and teachers should have a major share in decision-making at this level. Proposals are therefore made to extend the functions and authority, both of the 'school governing body' and of the principal and staff, particularly with regard to the curriculum of the school and other related matters, such as appointments.

3.4.3.2 Freedom of parental choice is an important issue at this level; however, it can never be absolute and must not constrain the needs or opportunities of others, limit the horizons of any child, inhibit the progress towards equal opportunity and equal standards in terms of national policy, make unreasonable demands which would lead to fragmentation or

divisive measures.

In practice, parental choice would have to be exercised by selecting
from a number of options made available to parents or created by them.
In the nature of things these options might well be very limited in
some communities, and it would be necessary for the regional education
authority to open up other options for those who desired them, even if
this meant the provision of transport or hostel accommodation.

3.4.3.3 It is also proposed that there should be *groupings* or *associations* of
schools, named *local school districts* (or possibly *school boards*) that
would make up units of management smaller in scale than the *region* or
subregion. Primarily this would not be a control mechanism but rather
a means to sharing common interests and strengthening co-operative ac-
tivities. In planning local school districts attention would have to
be given to educational considerations such as, for example, the need
to provide a complete range of options at the level of secondary educa-
cation. In the setting up of school districts the wishes of parents,
teachers and communities should be considered and the greatest possible
weight given to the principle and practice of *free association* rather
than to predetermined *cultural identities* established from above.

3.4.3.4 Attention is also drawn to the key roles that will be played by prin-
cipals and *circuit education officers* in the reform and reconstruction
of education management at local and regional levels.

3.5   THE INTRODUCTION OF A NEW SYSTEM

3.5.1   The critical factor in the implementation of a new management pattern
will be the issue of <u>legitimacy</u>, which will depend on -

acceptance by the *user* of the authority which establishes the educa-
tion system, and

the involvement of the user in the decision-making processes within that
system.

3.5.2   On both counts the immediate setting up of the South African Council for
Education is of paramount importance, so that -

the heightened expectations raised by the present HSRC Investigation
should not be soured and the momentum engendered in recent months be
maintained;

those communities that up to now have suffered severe educational dis-
advantages perceive that they are immediately being brought into the
processes of participation,negotiation and consultation before any fi-
nal decisions on the new dispensation are taken.

3.5.3   The reports of the HSRC Investigation into Education should serve as
the main agenda, in the short term, for the Council, which should also
be instructed to report and make recommendations on the financial pro-
visions made by all the existing education departments. Until one
single central administration is set up it should also be recognised as
the authoritative advisory and consultative body vis-a-vis all the min-
istries and departments at present concerned with education at central
level.

3.5.4   In order to create a climate of trust in which negotiation and consul-
tation could proceed in the most positive manner possible there are a
number of practical steps that could be carried out immediately. Not
only are they based on longer-term proposals of the work committee but
they are also possible with minimum changes to existing structures.
Among these proposals are:

(i)   An immediate start should be made with the reconstruction of the exist-
ing Department of National Education which should take over -

the existing educational functions of the Department of Internal Af-
fairs, and

all university and technikon affairs at present handled by other de-
partments.

(ii)   The Department of Education and Training should immediately begin with
the devolution of authority to its 'regional' administrative units so
that they could more easily and smoothly become part of the new second-
level education authorities.

(iii)   The new Regional Councils of Education should be set up as soon as
possible.

)   The Committee of University Principals should be reconstituted in or-
der to include the heads of <u>all</u> universities in South Africa, and de-
cisions on the admission of students at universities and technikons
should be left to the council of these institutions, thus abandoning
the ministerial permit system.

All private schools and institutions not in receipt of government sub-
sidies should be left unhindered to make their own decisions on the ad-
mission of pupils.

It is imperative that the immediate result of the work of the HSRC In-
vestigation into Education should be a general perception by as wide a
range of interests in South Africa as possible that there is a genuine
intention to bring about a new dispensation in education that will
benefit <u>all</u> children, <u>all</u> adults in need of further education and train-
ing and at the same time that will be more relevant to and effective in
meeting the social, economic and political challenges of our time.

APPENDICES   A – L

PRINCIPLES FOR EDUCATION IN THE REPUBLIC OF SOUTH AFRICA

1   Equal opportunities for education, including equal standards in education, for every inhabitant, irrespective of race, colour, creed or sex, shall be the purposeful endeavour of the State.

2   Education shall afford positive recognition of what is common as well as what is diverse in the religious and cultural way of life and the languages of the inhabitants.

3   Education shall give positive recognition to the freedom of choice of the individual, parents and organisations within society.

4   The provision of education shall be directed in an educationally responsible manner to meet the needs of the individual as well as those of society and economic development, and shall, inter alia, take into consideration the manpower needs of the country.

5   Education shall endeavour to achieve a positive relationship between the formal, non-formal and informal aspects of education in the school, society and family.

6   The provision of formal education shall be a responsibility of the State provided that the individual, parents and organized society shall have a shared responsibility, choice and voice in this matter.

7   The private sector and the State shall have a shared responsibility for the provision of non-formal education.

8   Provision shall be made for the establishment and state subsidisation of private education within the systems of providing education.

9   In the provision of education the processes of centralization and decentralization shall be reconciled organizationally and functionally.

10   The professional status of the teacher and lecturer shall be recognized.

11   Effective provision of education shall be based on continuing research.

APPENDIX B

OUTLINE OF EVALUATIVE CONCEPTS FOR THE ANALYSIS OF EDUCATIONAL POLICIES,
STRUCTURES AND PROGRAMMES

- compiled by Prof. W.B. Vosloo

1   General Comments
     - Basic Criteria
     - Instrumental Criteria

2   Examples of Basic Criteria
     - Equity/Fairness
     - Equality of Opportunity
     - Freedom of Choice
     - Public Interest
     - Public Responsibility
     - Public Accountability

3   Examples of Instrumental Criteria
     - Efficiency
     - Effectiveness

4   Values as Criteria of Analysis
     - Political Values
     - Social Values
     - Economic Values
     - Institutional Values

5   Putting Evaluation to Work
     - Searching for Goals
     - Deriving Criteria
     - Evaluation Procedure

1   GENERAL COMMENTS

It is proposed that a working distinction should be made between two
kinds of evaluative criteria:

1.1   BASIC CRITERIA, which are derived from basic assumed values (i.e. self-
justificatory *oughts*) which require no further defence than that it is
held to be right by those who believe in them. They may have defences
in terms of, for example, evidence that they lead to good or desirable
consequences, but these are not necessary for their statement or support.
They would in our case be those criteria directly or indirectly derived
from the basic *principles* formulated by the Head Committee.

1.2   INSTRUMENTAL CRITERIA, which are derived from instrumental values (i.e.
consequential or secondary *oughts*) which are defensible by reference to
basic values.

2   EXAMPLES OF BASIC CRITERIA

2.1   EQUITY/FAIRNESS

Definition: A condition of impartiality in the sense of not making an
exception for any person or group or favouring any person or group with-
out good reason or by virtue of a just claim.

Applications:
- procedures of decision-making/distribution of benefits and costs;
- outcomes of decision-making/distribution of benefits and costs.

Questions:
- Does fair procedure and fair outcome always coincide?
- What method(s) can be used to establish fair/equitable arrangements?
- On what grounds can specific arrangements be judged as fair/equitable
or not?

2.2   EQUALITY OF OPPORTUNITY

Definition: The elimination of deliberate or irrelevant barriers based
on race, sex or creed that deny access to educational facilities to par-
ticular persons or groups.

Applications:
- access to educational facilities
- discriminatory practices
- discrepancies in the quality of educational facilities.

Questions:
- Does equality for all, regardless of race, sex or creed imply absolute equality?
- What type of differentiation legitimately reflects the inevitable inequalities among human beings?
- What determines a *relevant* difference for the purposes of differential treatment?
- Should unequal treatment be based on ability or need?
- To what extent does equality of treatment come into conflict with productive criteria?
- If people have been treated unequally on irrelevant differences is remedial (distributive) justice called for to redress unfair inequalities?
- How do we identify the *disadvantaged* in society?
- Does *compensatory action* lead to new forms of discrimination against individuals or groups?
- Does *reverse discrimination* lead to the dilution of quality?
- In what way do financial resources affect the quality of education?

2.3 FREEDOM OF CHOICE

Definition: The absence of arbitrary restraints on the Freedom of choice of individuals or groups to have access to specific educational facilities.

Applications:
- access to educational facilities reserved for specific population groups
- freedom of association
- membership of professional associations
- neighbourhood schools/facilities
- mandatory separation/integration.

Questions:
- To what extent can the freedom of choice of one individual or group be qualified by the similar claims of other individuals or groups?
- Can the freedom of choice exercised by individuals be reconciled with the right of educational institutions to set their own rules of admission?

2.4 PUBLIC INTEREST

Definition: The preponderance of interests, social structures and practices commensurate with the common features and ideals of society
or
The aggregate of primary (essential) goods necessary for the maintenance of life and for the acquisition of other goods and requiring social efforts to provide them either through the market mechanism or through government action.

Applications:
- scope of educational programmes (areas)
- size of educational programmes (number of people)
- tangible accomplishments of educational programmes (targets, timespan, costs)
- symbolic accomplishments of educational programmes (impact on perceptions)

Questions:
- Which educational practices are in the interest of society?
- Should educational facilities be uniformly available to all?
- Should education be provided by public as well as private institutions?

2.5 PUBLIC RESPONSIBILITY

Definition: Being responsive to expectations and demands expressed by the general public by way of governmental institutions (legislative, executive and judicial), communication media, pressure groups, etc.

Applications:
- consequences educational programmes have for social well-being
- priorities expressed by general public

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- public participation i.e. opportunities for interest groups to participate in policy-making
- professional standards
- sense of responsibility exercised by teachers and administrative personnel
- expected roles.

Questions:
- How could the external responsibility of educational institutions be improved?
- To all of whom is an official expected to be responsible?
- To what extent does *responsible action* rest on professional standards and traditions rather than formal rules and regulations?

2.6   PUBLIC ACCOUNTABILITY

Definition: Being answerable to the general public for the achievement of certain results by way of adequate arrangements for the exercise of control and for the flow of information on which judgements of performance can be based.

Applications:
- specifications of duties
- areas of authority (e.g. discretionary powers in relation to responsibilities)
- ministerial responsibility
- formal lines of authority
- peer-group control.

Questions:
- Is the flow of information on which judgements of performance are based adequate?
- What role should peer-groups or organised interests play in bringing accountability to bear?
- What should be the policy-making role of officials?

3   EXAMPLES OF INSTRUMENTAL CRITERIA

3.1   EFFICIENCY

Definition: The quality of achieving the desired level of output
(i.e. the goals that are established) with the best allocation of
resources (i.e. using resources without waste).

Applications:
- effort, evaluation of the quantity and quality of educational activi-
  ty (input)
- impact, assessment of the objectives attained (output)
- process, diagnosis of activities whereby results are obtained e.g.
  planning, organizing, staffing, financing, budgeting, leading, commu-
  nicating, co-ordinating, controlling, evaluating, innovating and
  selecting work procedures or methods of operation.
- performance measurement, e.g. cost per full-time equivalent student,
  student-teacher ratio, percentage of classroom time utilized, etc.

Questions:
- Are structures optimally organized in terms of pre-selected structural
  prerequisites e.g. centralization and decentralization?
- Are there better ways to get superior results?
- Are there better ways to improve the ratio between objectives
  attained and resources (manpower, money and material) consumed?

3.2   EFFECTIVENESS

Definition: The degree to which a programme attains the desired ob-
jective(s); the degree to which performance is adequate in relation to
needs; the relation between desired and achieved output.

Applications:
- impact measurement of results of educational programmes such as num-
  ber of pupils enrolled, percentage of target population reached by
  programmes, or decrease in illiteracy, etc.
- performance measurement of reaching specific objectives such as num-
  ber of matriculants or graduates or qualified technicians or research
  output, etc.
- accomplishment measurement by comparing the net actual accomplishment

attributable to a programme with the accomplishment intended for the programme.

Questions:
- Are policies successful in terms of their own goals?
- Does a policy accomplish what it sets out to do?
- Do educational programmes meet the needs of society?

4   VALUES OF CRITERIA OF ANALYSIS

Apart from the distinction between basic and secondary (instrumental or consequential) values, the values underpinning educational policies, structures and programmes may also be classified in terms of the following broad categories: political, social, economic and institutional.

4.1   POLITICAL VALUES

- worth of the individual
- self-determination
- freedom
- equality/equity

4.2   SOCIAL VALUES

- helping the inadequate
- creating a sense of community
- promoting better interpersonal or intergroup relations
- improving minimum living standards
- family
- a better quality of life.

4.3   ECONOMIC VALUES

- increasing national resources
- increasing productivity
- defending society against effects of poor economic performance
- high employment rates

4.4   INSTITUTIONAL VALUES

- democratic participation
- local autonomy
- selectivity
- universality
- high levels of student performance
- status of teachers
- social/parental control
- equitable distribution of public burden
- teacher control over curricula and examinations
- social engineering
- protection of students' rights
- incentives
- efficiency/effectiveness

Policies, structures or programmes may be underpinned by more than one value and it can be difficult to identify the leading value applicable to a particular programme.

5   PUTTING EVALUATION TO WORK

Evaluation is determining whether your activities are effective in resolving the problem(s) at hand or the degree to which a programme attains its objective(s).

5.1   SEARCHING FOR GOALS

In order to measure the effectiveness of a programme the evaluator needs some yardstick(s) to measure it against, e.g. *objectives, goals, purposes* or *targets*.   These are necessary because activity must be directed toward some end.

5.2   DERIVING CRITERIA

Once programme objectives have been clearly defined, the question becomes: how to know when the objective has been reached? In other words, in order to give substance to goals, we need measures of programme accomplishment. These measuring devices of programme accomplishments are generally called criteria.

The evaluative criteria most generally used tend to be rhetorical in the sense that they are largely derived from basic values such as freedom, equality, equity, etc. As a result of the fogginess of such concepts, there has been increased attention paid to attempting to replace rhetoric with *facts* in the measurement of public policy programmes. These *facts* are the sub-parts of a well-defined objective in the sense that they attempt to give measurable substance to programme objectives.

As measuring devices for programme accomplishment, criteria should meet the following requirements:

- they should be relevant and important to the specific problem at hand;
- they should cover all the major effects of a programme;
- they should be capable of meaningful quantification.

5.3   EVALUATION PROCEDURE

Grover Starling (Managing the Public Sector, Dorsey Press, 1977) suggests the following general procedure for carrying out the process of evaluation:

(1) find out the goals of the programme;

(2) translate the goals into measurable indicators of goals achievement;

(3) collect relevant data on the indicators; and

(4) analyse the data in terms of the goal criteria.

HSRC INVESTIGATION INTO EDUCATION

WORK COMMITTEE: EDUCATION MANAGEMENT

FRAMEWORK FOR THE ANALYSIS OF EDUCATION MANAGEMENT
(compiled by Prof. W.B. Vosloo)

1   ORGANIZATIONAL STRUCTURE

1.1   DESCRIPTION OF EXISTING ORGANIZATIONAL STRUCTURE

1.1.1   Basic structural characteristics of education system

1.1.2   Internal structures of various subsystems (national, regional and local)

1.2   EVALUATION OF EXISTING ORGANIZATIONAL STRUCTURE

1.2.1   Pattern of departmentation

1.2.2   Pattern of functional specialization

1.2.3   Degree of centralization

1.2.4   Degree of decentralization

1.2.5   Internal organization of head offices

1.2.6   Internal organization of regional offices

1.2.7   Internal organization of schools, colleges and universities

1.2.8   Organization of staff and auxiliary services (e.g. provision of physical facilities, health services, etc.)

2   POLICY-MAKING AND PLANNING

2.1   DESCRIPTION OF EXISTING ARRANGEMENTS

2.1.1   Policy-making

2.1.2   Planning

2.2   EVALUATION OF POLICY-MAKING AND PLANNING ARRANGEMENTS

2.2.1   Determination of goals and priorities

2.2.2   Community participation at the various levels

4.2   EVALUATION OF PERSONNEL ARRANGEMENTS

4.2.1   Adequacy of manpower planning

4.2.2   Adequacy of norms for the creation and grading of positions

4.2.3   Equitability of arrangements for female employees

4.2.4   Arrangements for scarce or highly specialized personnel

4.2.5   Adequacy of recruitment, selection and placement procedures

4.2.6   Adequacy of criteria and procedures for seniority determination

4.2.7   Recognition of qualifications and experience

4.2.8   Equitability of promotion system and procedures

4.2.9   Employment of non-qualified personnel

4.2.10 Employment of part-time personnel

4.2.11 Arrangements for military service

4.2.12 Adequacy of general conditions of employment (leave, sick-leave,
        pensions, housing benefits, medical benefits, etc.)

4.2.13 Adequacy of compensatory conditions of service (transport and travelling
        allowances, transfer allowances, clothing allowances, etc.)

4.2.14 Adequacy of disciplinary arrangements (e.g. working hours, private in-
        come, auxiliary employment, grievance procedure, ethical codes, etc.)

4.2.15 Adequacy of direct remuneration (e.g. salaries, bonuses, increments,
        gratifications, special allowances, over-time remuneration)

4.2.16 Adequacy of arrangements for termination of service

4.2.17 Adequacy of employer-employee consultation and participation

4.2.18 Re-employment practices

4.2.19 In-service training and personnel development

4.2.20 The role of the central personnel agency (Commission for Administration)

4.2.21 The role of the Treasury in personnel matters.

5   IMPLEMENTATION (OPERATIONAL ASPECTS) AND CONTROL

5.1   DESCRIPTION OF IMPLEMENTATION AND CONTROL ARRANGEMENTS

5.2.1   Internal control

5.2.2   External control

5.2.3   Public Relations

5.2   EVALUATION OF IMPLEMENTATION (OPERATIONAL ASPECTS)

5.2.1   Delegation of authority

5.2.2   Quality of communication networks and processes

5.2.3   Mechanization/automation of records

5.2.4   Co-ordination of operational aspects

5.3   EVALUATION OF CONTROL ARRANGEMENTS

5.3.1   Adequacy of hierarchical formal lines of authority

5.3.2   Adequacy of leadership and supervisory skills and techniques

5.3.3   Adequacy of reporting procedures

5.3.4   Adequacy of inspection procedures

5.3.5   Adequacy of control by legislative, executive and judicial institutions

5.3.6   Adequacy of public responsibility by means of public communication media

5.3.7   Liability-responsibility and role-responsibility of institutions and individuals

5.3.8   Adequacy of adherence to professional standards

5.3.9   Adequacy of security arrangements

6   REFORM AND INNOVATION

6.1   DESCRIPTION OF ARRANGEMENTS TO PROMOTE REFORM AND INNOVATION

6.1.1   Mobilization of internal sources

6.1.2   Mobilization of external sources

6.2   EVALUATION OF ARRANGEMENTS

6.2.1   Adequacy of research and development activities

2.2   Elimination of inertia and *red tape*

2.3   Application of reorganization and productivity improvement techniques

2.4   Application of techniques of impact evaluation, i.e. examination of short and long-term programme effectiveness.

APPENDIX D

EVALUATORY COMMENT ON RESEARCH REPORT: C.D. BEUKES

*An analysis of the current situation regarding Education Management in the RSA
with special reference to the pre-tertiary level*

Authors: F.P. Buckland
           O.C. Van den Berg (February 1981)

1   TERMS OF REFERENCE

1.1   To determine with greater clarity the constraints of the terms of refe-
       rence for this project, reference was made to the minutes of a subcom-
       mittee meeting held on 3 December 1980 and the proposal document of the
       researchers (tabled during December 1980).   The proposal document quotes
       a HSRC document (Work Committee: Education management) dated 19-10-1980
       which specified the areas to be highlighted by the researchers - said
       document (also quoted in the research report, page 1) was not available
       for scrutiny hence the following comment is confined to the minutes and
       proposal document.

1.2   The subcommittee of 3 December 1980 was aimed at discussing and clari-
       fying the task allocated to the researchers.   The minutes of this
       meeting (page 1, item 3) states:

       *Die konseponderwysbeginsels en die kriteria ontwerp vir die evaluering
       van onderwysbestuur sal deur die navorsers in ag geneem word by die ont-
       leding van die situasie in die RSA.*

       Die volgende skema is deur die voorsitter aan die navorsers voorgehou:

       (a)   Besluitneming en raadpleging
       (b)   Kontrole en koördinasie
       (c)   Organisasie - Onderwysstelsel
       (d)   Informasievloei/Kommunikasie/beplanning

       *Waar die kritiese en analitiese ontleding van onderwysbestuur al boge-
       noemde aspekte in ag moet neem, word al meer na die terrein van onderwys-
       stelselbeplanning beweeg wanneer aspekte (c) en (d) ter sprake kom.   Die*

navorsers sal dit hul taak maak om die implikasies van die 'samevloeiing'
van 'bestuur'en 'stelsels'in ag te neem.

1.3   The researchers' proposal document which was tabled and accepted in
        December 1980, details their terms of reference and Aims of the study as
        follows (also repeated on page 1 of the research report):

        1 Terms of reference

        These are outlined in a document from the Education Management
        Work Committee dated 29-10-1980, paragraph 2.1:-

        This analysis of the factual situation would have to include the situa-
        tion of all the various education departments, make use of existing docu-
        ments as background material and consider the interdependence between
        the various components within each of the organisation models. Attention
        should be given to the illustration of problems.

        2 Aims of the study

             (a) To present a critical analysis of the process of educational
             management in South Africa

             (b) To isolate the areas where the education resulting from such
             management has failed to meet the perceived needs of those for whom
             it was provided and therefore has lost credibility as a legitimate
             education exercise

             (c) To isolate the areas where educational provision has failed to
             meet management objectives

        (d) To examine the reasons behind such failure.

1.4   It is unfortunate that the researchers were not required to make recom-
        mendations against the light of their analysis and comment on short-
        comings in the present situation of education management. Such recom-
        mendations would not necessarily be accepted by the work committee but
        would have provided a perceptive input to the formulation of the work
        committee's recommendations.

2 · RELEVANCE OF THE RESEARCH REPORT

2.1   An analysis of the instruction contained in the minutes of the subcom-
mittee's meeting (3-12-1980) would show that a rigorous analysis of the
present factual situation of Education Management in the RSA is required.
This contrasts sharply with the accepted proposal document where the
main thrust of the research is indicated as isolating (*highlighting*) cer-
tain problem areas and commenting on reasons for failure in such areas
which in turn indicated that an anecdotal approach would be used.
Further it is noted from the meeting's minutes that (a) the Main Commit-
tees' proposed Education Principles as well as (b) the Criteria for Eva-
luation of Educational Policies, Structures and Programmes presented by
Professor Vosloo (dated 17-11-1980) would feature and be considered in
the analysis undertaken by the researchers. Thirdly or (c) the analys-
is would be structured under the headings listed (a) to (d) in the
minutes (see Paragraph 1.2 of this report).

2.2   In appraising the research report, one concludes that the stated object-
ives of the proposal document were certainly achieved and the report
admirably highlights the general or basic shortcomings in the system of
Education Management in the RSA and which gave rise to the crisis situa-
tion which is current in education. It can however also be stated that
the report lacks a rigorous approach as could have been obtained if Pro-
fessor Vosloo's outline had been followed in conjunction with attention
being given to the proposed education principles. While accepting the
valid criticism of a lack of rigour, this does not, in my opinion, de-
tract from the relevance of the research report in respect of the basic
causes giving rise to the present crises in education. A word of
warning should be noted that where the researchers are highlighting cer-
tain features, their selectivity could give rise to an over-accentuation
of certain features in which case when viewed against a balanced expo-
sition of the whole structure and process of educational management, a
less dramatic impression would be gained.

2.3   Summing up then it can be said that the research report -

(a) carries out the intended aims of the researchers' proposal as de-
rived from the document dated 29-10-1980 from the Work Committee:
Education management;

(b) is drafted giving due attention to the scheme outlined by the work
committee chairman as noted in the minutes of the subcommittee's meeting;

(c) gives attention to some of the basic criteria listed in Professor
Vosloo's outline e.g. public accountability, centralisation/decentrali-
sation issues, freedom of choice (by implication) and the instrumental
criteria of efficiency. Important basic criteria of equality of oppor-
tunity and equity/fairness/justness do not receive specific attention;

(d) ignores the Main Committee's Education Principles in its analysis
and conclusions (possibly these were not made available to the research-
ers).

Since the obvious conflict in the instruction to the researchers, as
minuted and the intention of the researchers as outlined in their propo-
sal was not resolved earlier, one can conclude that the researchers'
report adequately completes the task as accepted in the proposal docu-
ment of the researchers.

3   ASPECTS HIGHLIGHTED BY THE RESEARCHERS

3.1   The researchers emphasize that education is a social process and educa-
        tion policy must be seen in the context of broad social policy and that
        the management of education has inherent political elements (p. 2 of re-
        port) with decision-making being the heart of organisation and the pro-
        cess of administration. The exercise of power seen in decision-making
        must be legitimate, i.e. all persons involved in this process must be
        active not just passive *receivers*.

3.2   Institutionalised education takes place in the context of a network of
        power relationships with everyone involved being a decision-maker. The
        vital issue becomes the power of the decision-maker to influence the
        educational policy where any shift in power dictated a change in admini-
        strative structure, e.g. in recent crises in education, the policy-
        maker (Minister) ignored his administrative structure and attempted to
        deal directly with the community.

3.3   In the RSA the power flowing from the authority to make policy-deter-
        mining decisions and the power derived from the ability to manipulate
        strategic resources (finances) is highly centralised. Decentralisation

of power is seen as being restricted to implementation of centrally decided policy, and grass-root involvement of parents and community in School Boards and Committees amounts to a role of no more than caretaker or fund-raiser.

3.4   Education is controlled by a cumbersome and very complex bureaucratic structure in parallel structures without a body which could co-ordinate policy decision-making; this task then falls to the Cabinet, i.e. it becomes an exercise in political power.

3.5   Planning is largely restricted to implementation of existing policy and very little attention is given to innovation in management to meet changed conditions. The education management structure serves the central authority and is unresponsive to the needs and aspirations of the community.

3.6   Consultation in each educational subsystem is restricted to the *experts* already in the field or to nominated bodies, i.e. advice is given by educational leaders rather than community leaders. This resulted in the alienation of large sectors of the community from the system. The division of the educational system into rigidly divided subsystems defuses teachers' and teacher organisations' input through fragmentation of such groups.

3.7   The South African education system is highly centralised since authority for policy decisions and the control of resources are both vested in central government while local governing bodies have control over merely administrative tasks (often minor). The researchers claim that the decentralisation of administrative authority resulting in the fragmentation of power groups, serves to increase the power of the central authority (page 53 of the report).

3.8   The researchers state that:

no real decision-making power rests with the people involved in the education process - teachers, parents and pupils (page 53).

3.9   (page 54) *the real centre of power tends to be with the educational administrators in the departments and with the political authorities who control them.*

*The mechanisms for the legitimation of this authority structure either
do not exist or have ceased to function adequately.*

3.10   The researchers conclude that:

*What is required is a change in the authority structure which will per-
mit parents, pupils, teachers and communities to contribute towards an
educational dispensation which will be more responsive to their hopes
and aspirations* (page 54), and further that attempts to reduce the
power of the bureaucracy which is required to increase the say of com-
munities, parents and teachers will have

implications which will extend far beyond the education system .

AN EVALUATION OF RESEARCH CARRIED OUT BY PROFESSOR M.B. STEINBERG AND PROFESSOR
J. VAN DER MERWE: C.A. NAGURAN

1   LIMITATIONS

        Due to the limited time available the two researchers had to rely solely
        on available literature for their information on Education Management in
        foreign countries. Under the circumstances they have done a very fine
        job and have produced a report which isolates aspects relevant for the
        proposed planned changes in South Africa's educational system. However,
        it should be pointed out that the actual case studies are largely
        descriptive - this is more evident in the case studies involving Canada,
        Switzerland, France, Nigeria, New Zealand and the Netherlands. One would
        have liked to see some analytical approach to the study.

        A study of available literature on foreign educational management systems
        has serious limitations. It is not the same as an on-the-spot study.
        Generally literature gives a good description of the systems of education
        but does not adequately capture the ethos and the dynamics of an educa-
        tion system. Moreover much of the information found in literature on
        comparative education is culled from sources generally supplied by
        government agencies who naturally like to present their system in a
        favourable light. Recently I read a report on the South African educa-
        tion system written by a South African in which he states that education
        for all the inhabitants is compulsory and education is provided in the
        pupil's mother tongue. A foreigner will no doubt accept this as being
        accurate.

        The processes of education management as described in literature do not
        always take place as described. Moreover the existence of legislation
        does not mean ipso facto that it has been implemented.

2   EVALUATION

2.1   The researchers have kept within the framework and the preliminary guide-
        lines. In selecting countries for study two important criteria were
        kept in mind:

.1.1   The existence of certain features within the education system and the
accommodating socio-politico-economic factors that are comparable with
the South African situation.

.1.2   The availability of data to which at least some of the considerations set
out by them in the introduction can be applied.

The researchers probably had much difficulty in selecting countries with
similar socio-politico-economic situations to that of South Africa.
Nowhere in the world is *apartheid* or separate but unequal political
ideology practised as in South Africa. In all the countries studied by
the researchers discrimination based on colour and legally enforced
racial laws are non-existent.

.1.3   Professor Steinberg begins with an appropriate introduction. He lists
five important variables (in keeping with the guidelines) in considering
the substantive content of each study.

The five variables cover a wide spectrum of education management and are
pertinent to the present investigation. Steinberg states that compara-
tive studies in the organisation and administration of educational sys-
tems have produced a number of underlying principles and theoretical
frameworks. One way of presenting these is in the form of alternatives
facing planners and policy-makers. He argues that apart from the choice
between centralisation and decentralisation there are the issues relating
to representation, which in the case studies are considered in the form
of answers to the following questions:

To what extent does government legislation directly regulate the admini-
strative machinery?

What should be the relative influence of government functionaries, local
representatives, professional educators, religious bodies and private
individuals?

From which of the following four levels do the major influences and ad-
ministrative traditions emanate - the government ministry, the regional
administration, the local school board or the governing body of the in-
dividual institution - in so far as day-to-day activities in the school
are concerned?

Should financial policy be directed to an even distribution of re-
sources, or towards the development or improvement of certain sectors
only?

2.1.4   The case studies clearly indicate *that changes in organisation and admi-
nistration are part of an organismic process, in which many factors are
involved. Thus due consideration has also to be given to all components
of the educational process, as well as to those contextual factors in-
volved.* Social change through education cannot come about without simul-
taneous changes in other sectors as well. We see this happening in Zam-
babwe, Mozambique, Nigeria, etc. An important point that the researchers
make is that one of the major errors in implementing change and inno-
vation in the organisational and administrative spheres has been the lack
of application of this organismic approach.

For example, the real standard of success is based not upon the model of
effectiveness, but rather upon the day-to-day routine in the classroom
itself. Similarly the individual teacher or pupil is ideally the basic
unit for implementing change rather than the passive recipient of new
policy decisions.

2.2   CENTRALISATION OR DECENTRALISATION

In all the studies cited by the researchers the question of centralised
or decentralised control of education has been adequately covered. The
merits and demerits of centralisation and decentralisation have been men-
tioned. In the South African context the terms centralisation and decen-
tralisation take on a different meaning.

In South Africa the Department of National Education has overall control
of education for Whites only. Non-Whites do not come under the control
of the Department of National Education. In the White set-up with its
provincial system of education, there is some measure of decentralisation,
in that within the broad framework of the National Education Policy Act,
each province conducts its own educational system. As far as Coloureds
and Indians are concerned, there is a centralised system of education.

For example, Indian and Coloured education throughout the Republic are
centrally controlled by their respective Divisions of Education. So
while there is some consideration for local and provincial variations in

White education, there is none for Non-White education.

In the context of centralisation and decentralisation the Non-Whites of South Africa perhaps are not so much interested in whether control of education is to be centralised or decentralised for the White group. What they are seeking is an education system which is fully integrated without any racial tags. This fact must be borne in mind when formulating policy.

2.3   IMPLICATIONS FOR SOUTH AFRICA

In the concluding pages, the researchers express caution against transplanting any facet of an education system from one country to another, without appropriate adjustments to local conditions. The researchers reiterate that since education systems do not operate in a vacuum, planners must be constantly aware of the interaction between reforms in education and corresponding changes in the social, political and economic context. *A clear assessment of every facet of this interaction is therefore a pre-requisite in the case of South Africa. The task in hand is therefore to co-ordinate envisaged changes in the system with those of the wider setting.*

In the case of South Africa one prerequisite is actual clarity as to the envisaged nature of reform and innovation as part of any emergent strategy.

In assessing the possible application of certain aspects in the foreign systems studied the researchers followed a sequence of procedure. This has helped to focus on the relevant aspects of educational management.

2.4   CONCLUSION

Of all the countries studied it would appear that one of the strongest criticisms levelled against South African education systems is the cumbersome and divisive nature of a series of education systems, each designed to perpetuate its state of separateness. *The inevitable consequence is seen as the present manifest state of inequality of educational provision.*

To my way of thinking there is something we can learn from the National education policy of Nigeria. The intentions of Nigeria on education administration are put very succintly. *The success of any system of education is hinged on proper planning, efficient administration and adequate financing. Administration includes organisation and structure, proprietorship and control, inspection and supervision.*

School systems and consequently their management and day-to-day administration, should grow out of the life and social ethos of the community they serve. Consequently the administrative machinery for the national education system should be based on three cardinal principles:

(i) intimate and direct participation and involvement at the local level, in the administration and management of the local school;

(ii) effective lines of communication between the local community and the state and national machinery for policy formulation and implementation;

(iii) a devolution of functions.

REPORT ON IMPLEMENTATION MODELS OF EDUCATION MANAGEMENT: J.F. STEYN

1   EDUCATION MANAGEMENT

1.1   INTRODUCTION

The report in question that was submitted to the work committee on 2
April 1981 poses three possible alternative models for education manage-
ment (Par. 2.1.1.2). Only the third alternative is elaborated on in
this report. It is assumed that the third model (Par. 2.1.1.2(iii))
satisfies the requirements for countrywide provision of education in the
future; that this model only satisfies the requirements of a *scientific
investigation* in accordance with the HSRC's terms of reference; and that
it is acceptable to the majority of people in the RSA.

1.2   ALTERNATIVE PROPOSALS (Par. 2.1.1.2(i) and (ii))

These alternatives also have the potential to be expanded further.

Alternative 2.1.1.2(i) which has as its basis both the community and
diversity of provision of education is based on the assumption that:

- differentiated education is educationally and pedagogically justified;
- initial mother tongue education provides the assurance that basic
  skills are mastered the most rapidly, and
- possible friction in respect of differences can be avoided in this
  way.

Alternative 2.1.1.2(ii) does not maintain a pattern of consistent cul-
tural differentiation. Both alternatives endorse the principle that the
ideal of education of equal quality and standards should be attainable by
the provision of funds and facilities. The other principles for the pro-
vision of education are supported by both alternatives. Alternative
2.1.1.2(i) however also has the promise that Principle 3 in respect of
the religious and cultural way of life caters for an individual interpre-
tation.

in essence both alternatives are in agreement except for the division into two ministries at the first level. The reasoning is that differentiated education will come into its own if each group also has its own minister to champion the interests of the group. Since the two alternatives differ only in respect of the ministries further guidelines are discussed here for Alternative 2.1.1.2(i) only.

2   ALTERNATIVE 2.1.1.2(i)

2.1   EDUCATION MANAGEMENT AT FIRST OR CENTRAL LEVEL

This alternative implies the retention of different ministers for the different population groups, with a Council of Ministers for co-ordination in respect of financing and standards and a multinational Education Council with clearly identified functions.

2.1.1   A multinational Education Council with its own administration

2.1.1.1 Functions

(A) Advise the Council of Ministers with regard to legislation for the provision of education and standards of education.

(B) Co-ordinate the relevant functions of the following councils and institutes:

- Council for Curriculum Development and Standards
- Council for Tertiary Education
- Council for Educational Research
- Council for Physical Facilities and Financing
- Council for Educational Technology
- Council for continued Education and non-formal Education
- Co-ordinating Federal Council(s) of Teachers' Associations

2.1.1.2 Composition
The Education Council must be representative of pedagogues from all population groups and all facets of education.

2.1.2 Consultation councils

2.1.2.1 Council for curriculum Development and Standards

(A) General

Besides pedagogues this council may also include specialists outside education.

(B) Functions

- The composition of broad outlines for the curriculums of non-tertiary institutions.
- Determining national standards for evaluation and certification for non-tertiary institutions.

2.1.2.2 Council for Educational Research Functions

- To refer general research on a contract basis to the HSRC and other bodies.
- To co-ordinate investigations with regard to macro educational matters.

2.1.2.3 Co-ordinating Federal Council(s) of Teachers' Associations

Co-ordinates the minimum standards an criteria for membership of the Federal Councils of Teachers' Associations on the understanding that the various federal councils will still be able to approach the ministers concerned.

2.1.2.4 Council for Educational Technology

(A) Production of software and software Pending service.

(B) Dealing with copyright matters.

2.1.2.5 Council for Physical Facilities and Financing

(A) Determining building and cost norms.

(B) Allocation of funds by the first level to decentralized institutions (pre-tertiary and tertiary).

2.1.2.6 Council for continued and non-formal Education

(A) To determine priorities for the various areas and to plan effective administration for implementation.

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(B) To liaise between the Manpower Commission and the private sector.

(C) To advise the Education Council on the allocation and expenditure of funds.

(D) To undertake in collaboration with the council for curriculum Development and Standards the development of guidelines for continued education.

2.1.27 Co-ordinating professional Teachers' Council(s)

To attend to the minimum requirements for registration and professional codes of the teaching profession.

2.1.2.8 Council for Tertiary Education

(A) To co-ordinate broad policy for tertiary institutions.

(B) To advise in respect of the canalization of high-level manpower potential.

(C) To co-ordinate the standards of tertiary institutions.

2.2   EDUCATION MANAGEMENT AT THE SECOND OR MIDDLE LEVEL

The principal point of departure is that cultural diversity is recognized and that every population group will have the right to organize its own education at this level. It follows therefore that every population group has the right in collaboration with its minister to work out a structure that satisfies and is in accordance with its needs. These decentralized structures may be composed of universal components but may also reveal particular features in accordance with the choice of each population group. The control and execution at this level should correspond to legislation at the first level but must also cater for individual structuring.

The Central Education Council with its councils is the umbrella institution that co-ordinates and advises all the population groups as indicated.

The present provincial framework with subregions is retained and may serve as an example for the various population groups. The second or regional level could possibly be structured as follows: policy, control and legislation will be the responsibility of the heads of the different regions (provinces and national states).

A co-ordinating council can advise at second level in respect of
- job opportunities;
- the need for differentiated training facilities (technical, etc.)
  for secondary and non-formal education.

The Council is made up of pedagogues and representatives of employer
organizations such as those in commerce and industry, agriculture, etc.

2.3   THE THIRD OR LOCAL LEVEL

2.3.1   Introduction

In the structure proposed here the point of departure is that only broad
definitions of policy must be laid down centrally in legislation to be
co-ordinated on a multinational basis by the various councils mentioned,
and that education can be organized statutorily as a function of the
second-level government.

At the local or third level the collective interests of schools of the
same population group in a specific area are dealt with by locally
elected statutory councils.

2.3.2   Participation at school level

Through the medium of representative parent bodies, parents should have
a say in choosing teachers for their schools as well as the course of
education in a school.

2.3.3   Local control bodies

Paragraph 2.3.8 of this report is endorsed and supported in respect of
all the points from 2.3.8.1(i) to (vii).

EDUCATION MANAGEMENT: FIRST LEVEL

COUNCIL OF MINISTERS

EDUCATION COUNCIL (MULTINATIONAL)
WITH ITS OWN ADMINISTRATION

INDEPENDENT

COUNCIL FOR EDUCATIONAL RESEARCH

COUNCIL FOR EDUCATIONAL TECHNOLOGY

COUNCIL FOR PHYSICAL FACILITIES AND FINANCING

FEDERAL COUNCIL(S) OF TEACHERS' ASSOCIATIONS

STATUTORY

COUNCIL FOR CURRICULUM DEVELOPMENT AND STANDARDS

COUNCIL FOR TERTIARY EDUCATION

COUNCIL FOR CONTINUED AND NON-FORMAL EDUCATION

CO-ORDINATING PROFESSIONAL TEACHERS' ASSOCIATION

SOME OBSERVATIONS ON THE PROPOSED CENTRAL CONSULTATIVE BODY FOR EDUCATION IN
SOUTH AFRICA
I.H. ROBSON

NEED

In the light of the Government's rationalization programme, any proposal
to create a further non-departmental or parastatal body can expect to be
looked at carefully and critically. (There are more than 1 600 such
bodies at present in existence.) However, the HSRC Investigation would
appear to have generated sufficient argument in support of a central con-
sultative body to justify its creation. Taking into consideration all
relevant factors and circumstances, such a body would seem to be necessa-
ry if the educational system is to achieve a larger measure of accepta-
bility.

NAME

The term *commission* tends to be associated with the appointment by the
State President of special purpose bodies (some on a permanent, others on
a temporary basis) of relatively small size. In the case of the proposed
central consultative body for education, which has been conceived of as a
rather large but widely representative body or forum to show the way in
educational matters, the term *council* would appear to be the appropriate
one. The name *South African Council for Education* would be accurate and
would presumably reflect adequately the status of the envisaged body.

PLACE IN THE SYSTEM OF GOVERNMENT AND ADMINISTRATION

Without detracting from the intended relatively independent (no body
forming part of the system of government and administration can ever be
fully independent) status of the central consultative body (CCB), it will
have to be linked to a specific member of the Cabinet. This is the con-
ventional channel of access for any parastatal body to the sovereign
power in the state, viz Parliament. In practice, there must be some mem-
ber of the Government who can speak for the CCB in Parliament, defend
its budgetary appropriation, table its reports, and answer members'
questions concerning it.

COMPOSITION

The composition of the CCB obviously requires careful consideration and is an issue which the present HSRC Investigation may not be able to resolve finally - especially in view of the formidable questions arising at the middle level of education management. However, it would seem clear that the following basic categories of actors require representation:

- parents
- teachers (teaching profession)
- academics
- education administrators (*bureaucrats*)
- employers

The biggest challenge to be faced in effecting adequate representation of interests will presumably lie with the representation of the parents.

FUNCTIONS

A central consultative body for education could naturally be expected to keep itself informed of educational needs, developments and problems, to consider courses of action and other solutions, and to tender its considered advice to decision makers. Its basic function would be to advise.

The functions envisaged for the proposed Permanent Commission on Education at Paragraph 2.1.3.1 of the draft report, would appear to go beyond those of a consultative body, and in fact to encompass also functions of an executive nature which would normally be found in a government department. Indeed, the allocation of resources referred to in Paragraph 2.1.3.1(ii) of the draft report goes beyond even the executive level and could be regarded as impinging on the role of Parliament. The determination of salaries and other conditions of service of teachers referred to in Paragraph 2.1.3.1.(vi) of the draft report is a matter which could more properly be dealt with at a central point in the administrative system with due regard being had to the needs of all categories of public employees remunerated from the same revenue source.

The functions as set out in Paragraph 2.1.3.1 of the draft report may well elicit substantial adverse response in administrative circles and (NOTE: References are to an earlier draft of the report.)

reduce appreciably the CCB's chances of being accepted. On the other hand, if the CCB is kept true to institutional type, meaning a consultative or advisory body, it would appear to have a better chance of being accepted and established at an early date.

Careful reconsideration of the functions of the proposed CCB would appear to be necessary. If it is intended to be a consultative body (within the total system of education management) then clearly its role should be restricted to tendering advice. In drawing up a statement of its role, the several aspects of education on which it needs to be heard, should of course be specified.

POWERS

Apart from accepting the self-evident point that the CCB should be given the statutory powers necessary to perform its functions properly, the concept of power is probably not particularly relevant in considering the role which the CCB could or should play in education management. The appropriate concept is more likely to be that of <u>authority</u>. While any undue concern on the part of the CCB with obtaining power could be expected to meet with opposition, its active cultivation of authority (<u>gesaghebbendheid</u>) in educational matters is less likely to be challenged - if at all. The proper course for the CCB would appear to be clear: to establish its authority in educational matters and to conduct itself thereafter in a manner which would ensure its continued acceptance as an authoritative body. The exercise of authority by the CCB would be fully reconcilable with a function which is basically advisory.

MODE OF ACTING

The CCB's mode of acting requires some analysis and deliberation. As an advisory body the CCB typically would <u>make recommendations</u>. The effectiveness of the CCB may however be enhanced if a distinction could be made between recommendations concerning general issues and recommendations bearing on specific matters, for example an aspect of curriculum or a new examination. Such a distinction could conceivably be formalised in the Act establishing and governing the CCB. Parliament may even be prepared, as a means of supporting the credibility of the CCB, to prescribe the ways in which decision-makers shall respond to specified classes of re-

commendation.

The matter of the CCB's mode of acting would appear to require substantial further attention especially at the legal drafting stage.

"INDEPENDENT" AND "CONSTITUENT" BODIES LINKED TO THE PROPOSED CCB

The *independent* and *constituent* bodies envisaged in the draft report would all appear to be supportable from an administrative point of view, with the exception of the proposed independent body for educational research and development. In the latter case, the detaching of educational research from the HSRC has not been adequately motivated. Whether the status of *council* is justified in the case of the constituent bodies, is an open question; more so if the CCB itself is to be known as a council. The functional relationship between the bodies in question and the CCB will need to be spelt out in some detail.

ONE DEPARTMENT?

Totally convincing argument for a single education department has still not been forthcoming. Having regard to the outstanding constitutional issues and divergent political views, it is not sufficient to maintain that a single department would work better than a plurality of depart- ments; convincing argument will have to be advanced to the effect that a plurality of departments cannot be made to work satisfactorily.

Clearly, the proposed CCB, if accepted by Government and established in a viable form, would have a substantial influence on education manage- ment in South Africa. It may go a long way towards eliminating present shortcomings ascribable to a plurality of departments. An assessment of the CCB's efficacy obviously cannot be made until it has had an opportu- nity to prove itself. It should be borne in mind that there are instan- ces of a plurality of departments working quite satisfactorily in the South African situation, probably because suitable co-ordinating mecha- nisms are in operation - cf. the provincial education and hospital ser- vices departments.

OPOSAL FOR THE MANAGEMENT OF ADULT AND NON-FORMAL EDUCATION

BASIS FOR THE PROPOSAL

1   THE PRINCIPLES

Principles 1, 5 and 7 of the document <u>Principles for the provision of</u>
<u>Education in the Republic of South Africa</u> (1981-03-10) refer to non-
formal education either directly or indirectly. In preparing this paper
we have assumed the following from these principles:

1.1   In Principle 1 the reference to *inhabitant* rather than *child* indicates
that the concepts of *equal opportunities* and *equal standards* includes
the system of educational provision for adults as well as the formal
schooling system;

1.2   that Principle 5 indicates the need for a system of non-formal education
that complements the system of formal education;

1.3   that Principle 7 explicitly indicates joint roles for the state and the
private sector in the management of the system.

2   THE HISTORICAL SITUATION

In reality, we must deal with a situation in which the majority of the
adult population of the RSA has to date had little or no education.
This is a historical situation which will not be touched by even the
most scientifically planned and generously financed school system. The
provision of adult and non-formal education is essential to improve the
educational standards of this very large group. In time, the system
devised should also be capable of conversion to one of continuing or
lifelong education, in response to the changing needs of society. How-
ever, the system of adult and non-formal education will for the fore=
seeable future have a strong compensatory nature.

2   ESSENTIAL CHARACTERISTICS OF AN ADULT AND NON-FORMAL EDUCATION SYSTEM

2.1   The essential characteristic of the system should be the <u>delivery of</u>
        <u>educational opportunity to adults in their real life situation</u>. This
        contrasts with (and complements) the characteristic of the formal school-
        ing system, which is to provide increasing access to opportunities for
        the school-going population. The non-formal system needs to be more
        initiative in character, and even more user-oriented than the formal
        system.

2.2   It follows then that the non-formal system must be <u>responsive</u> above all
        to the identified and articulated needs of adults. It should embody a
        high degree of <u>consultative</u> structures and processes, involving all in-
        terested parties. Provision for this must be made at all levels, but is
        especially important at lower levels.

2.3   The non-formal system must also be seen to be <u>equal in status</u> to the
        formal schooling system, and related to it wherever possible. Parity is
        especially important as regards the resources made available to the two
        systems at the national level.

2.4   If the non-formal system is to be responsive to needs and deliver oppor-
        tunities where the learners are, the emphasis in the design of the
        management system should be at the <u>local level</u>. Here, the activities of
        industry, commerce and private educational agencies should form an inte-
        gral part of the system.

2.5   Accordingly, the system will require a high degree of co-ordination of
        activities, consistent with allowing autonomy to individual institutions
        and companies to provide opportunities that meet the needs of the learners,
        while avoiding duplication and unnecessary competition for resources.

2.6   The system will require considerable integration into the local formal
        system in order to make best use of scarce resources. This applies
        especially to the employment of school teachers as adult education
        teachers, and the use of school facilities for non-formal education
        courses.

3   GENERAL COMMENTS ON MANAGEMENT SYSTEM

3.1   In proposing a management system to achieve the purposes set out in 2
       above, we have used as our model the approach discussed by the Work
       Committee: Education management on 16 March 1981.

3.2   However, the system proposed could be implemented in other ways, provided
       that the emphasis on local delivery of educational opportunities is
       maintained.

3.3   In reading the following paragraphs, reference should be made to the
       attached diagram (Schedule I).

4   LOCAL LEVEL

4.1   INSTITUTIONS

       This level comprises the agencies actually delivering the educational
       opportunities. It is envisaged that these could be either state-financed
       and managed; or state-subsidised and privately managed; or privately
       financed and managed. *Institutions* would include courses provided by
       commerce and industry.

       It is desirable that the institutions should have a high degree of
       autonomy and be flexible in responding to local needs. Private agencies
       would organise their affairs freely. No registration of institutions
       should be required.

4.2   LOCAL DEVELOPMENT OFFICER

       In our opinion, this is the key level of activity. The officers would
       co-ordinate the activities of institutions to avoid undue competition
       and duplication; make known regional and national priorities, research
       etc.; monitor local needs and attitudes; and help institutions to evaluate
       progress. It is envisaged that each officer might be responsible for
       these activities in respect of 8 - 10 institutions. The local develop-
       ment officers would actively seek to develop the non-formal system in
       their area within parameters laid down by the national and regional
       directors of adult and non-formal education.

4.3   DISTRICT DEVELOPMENT OFFICER

He would undertake supervision of several local development officers and act as chairman of district boards for adult and non-formal education.

(Note: The staff structure continues upwards through the regional director(s) to the national division of adult and non-formal education.)

5   CONSULTATIVE STRUCTURE

5.1   DISTRICT (REPRESENTATIVE) BODY

This is the key level in the consultative structure. All agencies involved in adult and non-formal education require to be represented, as well as:

local employer bodies

local trade union bodies

local experts from universities / technikons and education colleges

representatives of teachers, administrative staff and adult students

local social welfare and development agencies

representatives of the formal schooling system.

The functions of this body would include:

assessment of local needs

co-ordination of activities to meet these needs

evaluation of success in meeting these needs

consultation on allocation of local resources

recommendation to the regional consultative level.

5.2   REGIONAL COUNCIL FOR ADULT AND NON-FORMAL EDUCATION

Functions: interpret national policy and priorities in regional context

determine regional priorities

resolve issues from district bodies

allocate regional budget

evaluate regional activities

advise on staff appointments at regional level

recommend to national level

<u>Composition</u>:   regional employer bodies

regional trade union representatives

representatives of District bodies

regional development agencies

regional local government

community interests

5.3   NATIONAL COUNCIL FOR ADULT AND NON-FORMAL EDUCATION

<u>Functions</u>:   determine and recommend national policy in adult and
non-formal education

obtain funds and allocate within adult and non-formal
sector

commission research and evaluation

<u>Composition</u>:   relevant members of South African Council for Education

relevant members of regional councils for adult and non-
formal education

members of other relevant bodies at national level

independent expert members

representatives of *user* bodies: employers, trade unions,
etc.

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                                                                          ┌──────────────────┐
                                                                          │ National Council │
                                                                          │  for Education   │
                                                                          └──────────────────┘
         ┌─────────────────────────┐    ┌──────────────────────┐
         │   NATIONAL DEPARTMENT   │    │ National Council for │
         └─────────────────────────┘    │ Adult & N.F. Education│         ┌──────────────────┐
                                         └──────────────────────┘         │ Regional Council │
         ┌─────────────────────────┐                                      │  for Education   │
         │  REGIONAL DIRECTOR OF   │                                      └──────────────────┘
         │       EDUCATION         │
         └─────────────────────────┘
                                         ┌────────────────────────────┐
         ┌─────────────────────────┐     │ REGIONAL COUNCIL FOR ADULT &│
         │   REGIONAL DIRECTOR     │─ ─ ─│   NON-FORMAL EDUCATION      │
         │  A & N.F. EDUCATION     │     └────────────────────────────┘
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         ┌─────────────────────────────┐
         │ DISTRICT DEVELOPMENT OFFICER │◄─ ─ ─ ┌────────────────────────────────────────┐
         └─────────────────────────────┘       │  DISTRICT (RESPONSIBLE) BODY           │
                                                │ (Chairman: District Development Officer)│
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│LOCAL DEVELOP-│ │LOCAL DEVELOP-│ │LOCAL DEV.│
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┌──────────────┐ ┌──────────────┐ ┌──────────┐      │      Institutions /              │
│6-8 institut. │ │6-8 institut. │ │6-8 inst. │      │ teaching staff/administration staff│
└──────────────┘ └──────────────┘ └──────────┘      │          & students              │
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ADULT AND NON-FORMAL EDUCATIONAL INSTITUTIONS

SOME THOUGHTS ON THE CRITERIA FOR THE DELIMITATION
OF EDUCATIONAL REGIONS

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Department of Town and Regional Planning
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March 1981

1   INTRODUCTION

        This report has three parts. They consist of:

1   A theoretical introduction to the three types of regions with which
        planners are most commonly concerned;

2   A discussion of the types of criteria which appear to be appropriate
        for the delimitation of educational regions; and

3   A concluding section on the *cyclical planning process* which may be
        relevant to the committee's view of the mode of delimitation, and per-
        manence, of the educational regions.

        In the ensuing discussion of the criteria certain points will become
        evident. First, the criteria derived should reflect the goals of the
        task at hand. If there is no clarity of goals, the criteria derived,
        and their priority weighting, will result in the delimitation of sub-
        optimal regions. This report is based on assumptions regarding the
        committee's educational proposals. The assumptions centre on the pre-
        sumed desire to obtain the most economically efficient region possible;
        to create an optimum population size of educational region for admini-
        strative purposes, relative to accessibility considerations; and to ob-
        tain politically feasible districts, which implies maximizing social and
        cultural homogeneity. A second point is that ostensibly *neutral*
        efficiency-related criteria will have implicit spatial ramifications.
        Thus the drawing up of educational region boundaries, or at least the
        gaining of acceptance of the criteria to be used for this purpose, may
        prove to be a politically sensitive and arduous task. Thirdly, we have
        not presumed to determine the optimum size of educational region. Once
        such criteria are decided by the committee, we have provided an idea
        regarding the means of determining educational region boundaries.

        In addition to the criteria mentioned below, there are various techniques
        available through which the criteria are used to actually define regional
        boundaries. Some of the techniques require a great deal of time and
        effort, and are relatively complex. While a discussion of such tech-
        niques is not considered to be a part of the brief to the authors, it
        was thought necessary to point out that the technical side of the process
        of regional delimitation may require a significant amount of time and
        resources.

2   THE THREE TYPES OF REGIONS

Regional sizes and types are potentially infinite. The definition of
a region reflects the purposes of those defining it. Nonetheless, most
regions reflect an orientation to one, or an amalgam of, three sets of
criteria. The sets of criteria, or orientations, refer to homogeneous,
nodal and planning regions. Each has influenced the authors' perception
of the criteria relevant to the delimitation of educational regions.
Consequently the substance and rationale of each type is briefly dis-
cussed, as follows:

2.1   HOMOGENEOUS REGIONS

Homogeneous regions are defined in terms of some specific criterion or
criteria. The areas comprising such a region adhere together because
they are homogeneous with regard to the relevant criteria. The criteria
may be economic, social, political, or whatever else acts as a dis-
tinguishing characteristic of regions. The assumption implicit in the
use of homogeneous regions is that interregional differences are more
significant than differences internal to the region.

Homogeneous regions are particularly useful for policy purposes, when the
goal is to attack a specific problem. For example, some of the tradi-
tional criteria of a *depressed* region are relatively high unemployment
rates, relatively low incomes, and high outmigration rates. The regions
defined using these criteria will then be subject to various policy
measures such as infrastructural inputs, industrial location policies,
and so on. However, it is presumed that the proposals of the committee
are concerned not so much with redressing the regionally unequal
availability of educational facilities as with administering educational
regions. In this regard, the homogeneity criteria are again relevant.
Social and political homogeneity implies a mutuality of interests.
This may be important for consensus purposes.

2.2   NODAL REGIONS

Nodal regions are central to a concern with economic efficiency.
Population and economic activity are not scattered uniformly over space
but are typically focused on urban centres, with population density in-
creasing in proximity to the urban centre. Nodal regions are defined
in terms of internal flows of goods and services, contacts and inter-
dependencies. Areas are allocated to this or that region depending on

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which region (or urban centre) they have stronger linkages with. These
linkages can be measured through reference to flows of people, goods,
services, and communications.

Nodal regions are relevant to the delimitation of educational regions
since they are likely to be the most economically efficient regions
possible with regard to minimizing transportation and communication
costs. The concern with nodality may contradict to some extent that
with homogeneity. In the case of a trade-off between homogeneity and
nodality criteria, a decision between them presumes a priority ranking
between the criteria. Once again the need for goal clarity is evident.

2.3   PLANNING REGIONS

Administrative and political areas frequently serve to define regions,
or at least the building blocks of regions. For example, in South
Africa magisterial districts may provide the building blocks of educa-
tional regions. Using the districts provides administrative and data
continuity, a concern which is likely to be of some importance. How-
ever the use of magisterial districts does not represent a theoretical
or policy optimum. Regions defined using magisterial districts may be
inconsistent with the regions defined using other criteria. Neverthe-
less, the practical advantages of using magisterial districts would
appear to outweigh such problems. If, as anticipated, the educational
regions will comprise several magisterial districts, then the inclusion
of several districts within one region may alleviate somewhat the
spatial awkwardness of individual district boundaries.

3   CRITERIA FOR THE DELIMITATION OF EDUCATIONAL REGIONS

The criteria relevant to the delimitation of regional boundaries for
educational purposes appear to be of four types. Note that the types
reflect assumptions regarding the goals of the committee's educational
proposals. First, there are the criteria related to the 'Planning
Region' discussion above. With all the caveats noted, it appears de-
sirable to use magisterial districts as the building blocks of educa-
tional regions. Second, for efficiency purposes, the regions should be
nodal. Third, in order to retain percieved regional identities and to
maximise the potential for consensus, it is desirable that the regions
achieve the greatest social homogeneity possible. It should be empha-
sized that the authors are not advocating separate development. This

criterion is desired because of the perceived importance of achieving
political consensus within regions. Needless to say the criteria have
little application to the larger urban areas. Finally, there are the
committee's views regarding the optimum size of educational region,
presumably defined in terms of size of school-going population.

The first type of criteria have been dealt with in sufficient detail and
are not repeated. The criteria comprising the second, third, and fourth
types are discussed below. Prior to doing this, however, it should be
noted that an additional set of criteria is possible if the committee
intends to address the problems of specific regions, or to obtain as
much equality as possible between educational regions. These criteria
would involve reference to the availability of educational facilities,
qualified teachers, school overcrowding, examination pass rates and, if
schooling is not free, per capita incomes. The use of inequality cri-
teria would be spatially awkward. For example, two similar, highly
interconnected, predominantly Black magisterial districts may be
assigned to different regions in order not to overload one region with
poor educational facilities. In this example the homogeneity criteria
would be negated. Moreover, once a semblance of regional equality
has been achieved, the compromises in regional delimitation made in
order to accommodate the inequality criteria will have resulted in the
creation of suboptimal regions. An alternative use for the inequality
criteria, one for which they are particularly well situated is in the
derivation of a formula designed to allocate educational funds between
educational regions. Inequality criteria are probably best utilized for
fund allocation purposes, both to and within regions. In this regard it
may well be the case that the monitoring of inequality and other educa-
tional problems will occur over areas not coincident with the educatio-
nal regions.

3.1   NODAL CRITERIA

The relevant criteria here are several, and a number will be suggested.
It should be noted, though, that through the use of criteria such as
those listed below the Government has already defined 38 economic
regions for South Africa, this excluding the homelands and the larger
metropolitan areas. In general, the regions consist of several magis-
terial districts and are nodal. The homelands are represented more or
less as gaps in the map. Frequently in such cases the 'main town' of
the economic region is not central to the region, but located to one

side of the region next to an adjacent homeland. Homelands as gaps and acentral main towns do not satisfy the nodality criteria.

Among the various criteria available, two of obvious relevance to the identification of urban fields are commuting patterns and telephone calls. Both job commuting and trips to the market may be likened to the spokes of a wheel. They focus in on a centre and demarcate its area of influence. Flows of telephone calls will similarly describe directions of high and low interaction. Once again it is anticipated that the flows will be stronger towards a particular, usually closer centre.

The use of criteria such as the above two results in the derivation of urban fields. Since an educational region is likely to contain several urban centres and their areas of influence, additional criteria are necessary in order to determine which set of urban centres interact more highly than another set. This task is simplified by size differences between urban centres and the likelihood that the largest centre will exert its influence over the smaller centres and their immediate urban field. As a result some additional criteria are the size of urban centres, car and truck flows, and flows of goods to the larger centres.

Size is most usefully ascertained in terms not of population size, but of socio-economic differentials. It is not the population size of a centre, but the functions it performs which determine its influence. Surrogate indices for size so defined are the number and type of economic activities it contains, for example, a supermarket in one town versus a general dealer in another; and the same with regard to social and administrative facilities, for example, a hospital versus a clinic. The various flows are especially useful when a smaller centre is about equidistant between two larger centres - the flow then indicates which large centre predominates. In instances where smaller centres are significantly closer to one than another centre, the assumption may be made that proximity dictates superior influence. Finally, it is nevertheless to be expected that certain more remote rural areas will fall between the boundaries of the regions defined using the above criteria. Since regional contiguity is obviously necessary, an allocation is needed. The decision will be fairly arbitrary, guided somewhat by the existence of magisterial district boundaries which may of themselves suggest the area's allocation to this or that region.

3.2   HOMOGENEITY CRITERIA

Given the ethnic diversity of South Africa this concern is not easily
implemented and must surely become a difficult political task. The ob-
jective, as perceived by the authors, is that educational regions should
reflect perceived regional identities and minimize ethnic and language
diversity. It is presumed that this will enhance the potential for
consensus, and simplify the task of teaching. Perceived regional
identities may be reflected in newspaper subscription patterns and
voting behaviour. Minimizing ethnic and language diversity involves a
juggling of magisterial districts in relation to the other criteria, and
in terms of the committee's goal priorities. One problem is that if
educational funding is not based on inequality criteria, separating
Whites and Blacks will entrench the unequal availability of education.

3.3   ADMINISTRATIVE CRITERIA

The optimum size of school-going population for administrative purposes
would seem in itself to determine the extent of an educational region.
Given the existing magisterial districts and knowledge of the other two
sets of criteria, magisterial districts may be added together to that
point where their population size is appropriate; and in such way as to
maximize social homogeneity and economic interaction relative to any
other (politically feasible) combination of magisterial districts. How-
ever, this allocation method must inevitably be affected by population
density. In large metropolitan areas where the optimum size is exceeded,
there may be little basis for deriving more than one region. In such
instances a larger than optimum educational region may be appropriate.
Conversely, in remote rural areas accessibility problems may dictate
educational regions smaller than the size optimum.

An additional factor deals with whether the committee desires to define
different regions for different levels of education. In this case two
or more levels of educational regions may be derived, with the lower
levels constituting the building blocks of the upper levels.

4   THE CYCLICAL PLANNING PROCESS

Two factors initiate this concern with process. The first is that the
perceived role of the educational region may change over time. The
second is that the socio-economic criteria reflect changing phenomena.
The inevitability of change suggests that at some point regional re-

delimitation may be desired. The result is a call for flexibility in planning process, administrative structures and regional boundaries.

The goal, simply, is that the planning and administration of the educational programmes and the regional boundaries should be able to adapt to changing circumstances. The product will thus be able to be updated and modified to suit new conditions. In principle this means that the planning and monitoring of the product should ideally be continuous. This process is in sharp contract to the *master plan* style of planning so prevalent in South Africa. The master plan approach represents adherence to a single solution, to an ideal response to a problem rather than to a dynamic approach to the future. The master planning process responds to a usually politically identified problem, constructs an ideal solution for that problem, and relies on authority for implementation. The process is linear and terminates with the execution of the plan. It may be summarized as involving the following steps:

- problem identification
- analysis
- diagnosis
- plan formulation
- plan implementation.

In contrast, the flexible approach presently advocated is more cyclical in nature. The essence of this process is that it is repetitive and involves continuous monitoring and review of both the programmes being implemented and the environment in which they are having an impact. As such the process relies on continuous (periods of) data collection - see Figure 1. Through this continuous monitoring the process facilitates goal and programme adjustment as circumstances change. In addition, the process facilitates the accumulation of knowledge and an implied increasing effectiveness.

The flexibility of the cyclical approach necessitates ongoing decision-making. As the effects of past decisions are ascertained, and as the goals and circumstances change, so new inputs from decision-makers are required. A feature of this repeated, and rather demanding, reliance on decision-making is that public opinion can be better integrated into the planning process. Instead of only some initial public decision among limited alternatives, these decisions or opinions may be ascertained periodically and with consequence for plan outcomes. The potential
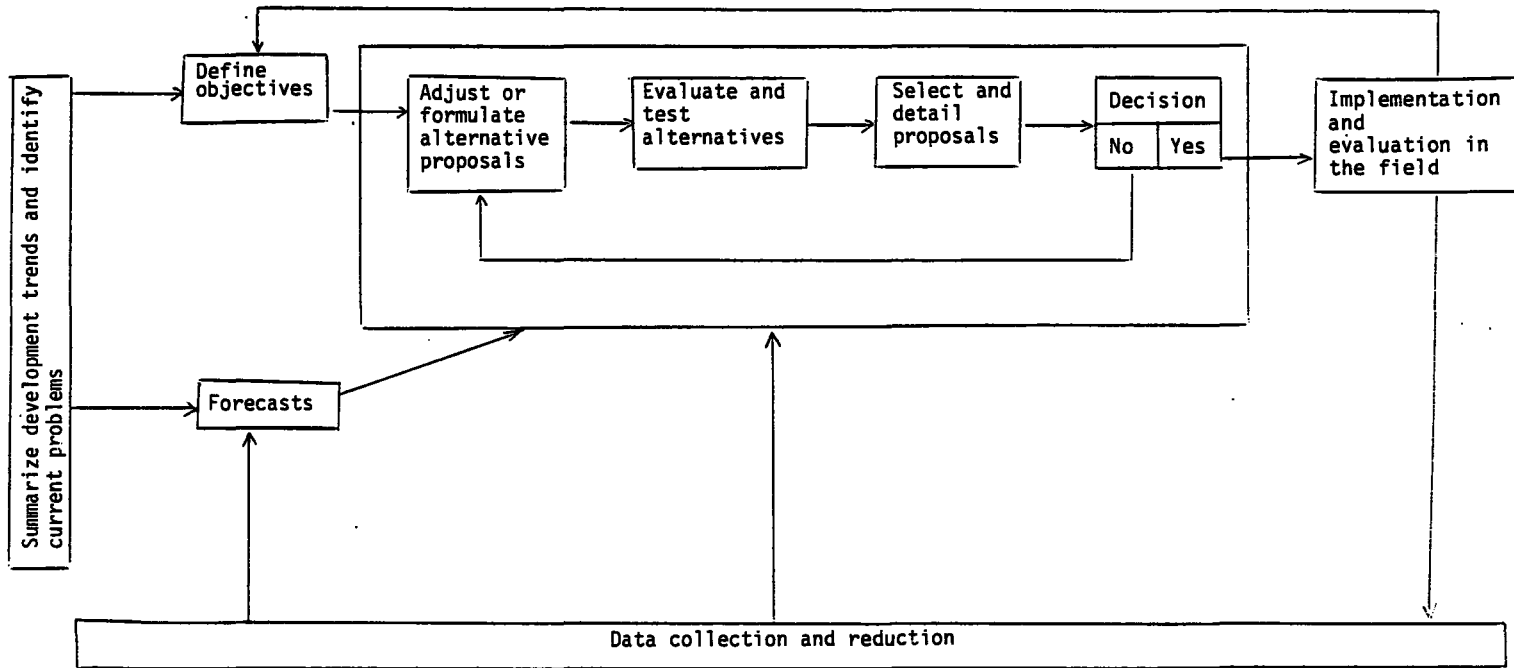
THE CYCLICAL PLANNING PROCESS

Figure 1

for added public inputs means public opposition / support also has time to grow. The cyclical approach, when it makes provision for significant public inputs, represents a more democratic planning style.

In conclusion, the use of the cyclical approach implies a wider concern than that of defining the optimum region. As administrative structures, financing, social and other phenomena change, so too will the optimum educational regions. If these changes are responded to through a cyclical planning process, there is greater likelihood of retaining some co-ordination among the diverse elements of the committee's proposals.

AN EXAMPLE OF A MODEL OF PHASING AND TIME-SCALES IN THE FIELD OF EDUCATION
MANAGEMENT

1982   Set up the South African Council for Education and its related consul-
        tative bodies, together with its multiracial secretariat, as proposed
        in paragraph 2.4.2 of this report.
        Re-organise the Department of National Education as in paragraph 2.4.4(ii).
        Take the steps suggested in paragraph 2.4.4.

1983   Concentrate on the planning of the new regional education authorities.
        Appoint regional councils and their related consultative bodies, the
        regional director, head of the regional planning unit and other core
        staff. Prepare for transfer of staff, schools, etc. from the centralised
        departments (National Education and Education and Training) to the new
        regional education authorities.

1984   Implementation of Option 5 (see Appendix K) and prepare for Option 6.
        Set up *regional schools* providing other options.

1985   Implementation of Option 6.

1986   Move into Option 7.

(Notes: 1   In terms of expectations this would be seen by many as a conserva-
             tive model, but it would provide time to unravel the existing
             situation, conduct consultative and negotiating procedures and gain
             the co-operation of all the interests that would be affected.

         2   It would also be imperative during 1982-3 to deal with such practi-
             cal issues as:

             putting teachers' salaries on a common basis; applying the same
             norms to school buildings and equipment;

             a programme for the subsidisation of private schools; dealing justly
             with the allocation of financial resources;

             starting procedures for national curriculum guidelines and
             guaranteeing national examination standards.)

APPENDIX K

A SUGGESTED CONTINUUM OF OPTIONS IN EDUCATION MANAGEMENT FOR SOUTH AFRICA

OPTION 1:   Status quo: THREE separate ministries and the provinces plus a
             co-ordinating Council of Ministers, and a co-ordinating Education
             Council.

OPTION 2:   TWO separate ministries (following the President's Council concept):
             National Education, with ethnic *divisions* and Provinces; Department
             of Education and Training; plus a co-ordinating Council of Ministers,
             and a co-ordinating Education Council.

OPTION 3:   ONE ministry and education department, but with ethnic *divisions*
             within the department; Provincial education departments retained;
             ethnic *divisions* broken down into separate regions on existing model
             of DET and Internal Affairs; plus SA Council for Education and
             linked consultative bodies.

OPTION 4:   ONE ministry and department, but organised according to educational
             not ethnic function, plus SA Council for Education, etc.

             REGIONAL organisation throughout, but separate ethnic regions (not
             identical geographically) plus regional consultative bodies.

OPTION 5:   As Option 4, but with geographically identical regions, within which
             separate ethnic divisions from one regional education authority,
             together with strong consultative and co-ordinating machinery.

OPTION 6:   As Option 5, but with regional education authority based on common,
             educational (not ethnic) function, but with ethnically separate
             school district units; also *regional schools* to provide more open
             options not available in the local *school districts*.

OPTION 7:   As Option 6, but common *school district* organisation, with differen-
             tiation only at school level, at which level parents would exercise
             choice in regard to the various options available.

MEMORANDUM ON CERTAIN PROPOSALS OF THE WORK COMMITTE: Prof. J.H. JOOSTE

As was agreed, a few observations which I, as a member of the Work
Committee: Education management, wish to submit to the Synthesis Com-
mittee, are given here. I agree with the following recommendations con-
tained in Paragraph 3.4 which I shall also explain further.

(i)   There will be three levels of education management.

(ii) For a number of reasons such as the scope of the practical problems
confronting management and the fact that we have a multi-racial popula-
tion, education management should be decentralized.

(iii) There should be a South African Council for Education, composed of
members from the various population groups, that can advise the minis-
ter on matters of policy and which will have its own permanent secreta-
riat.

(iv) It is a matter of principle that the functions should be defined
and handled in their own right.

There is a slight deviation from the argument in the Report where the
seven alternatives are stated. There are elements in more than one of
the alternatives from which a choice must be made. The recommendation
that there should be one minister is supported, provided that his func-
tions will primarily be those of policy-making in connection with finan-
cing and determining criteria for minimum standards all along the line
of education. (When the constitutional dispensation is developed, this
matter will of course have to be considered further.) Statutory coun-
cils can perform certain functions. It is also felt that there should
not be too many committees and that at this stage recommendations
should not be made concerning the composition of committees other than
the SA Council for Education. Only functions which fall under the
South African Council for Education and for which committees can be
appointed by the South African Council for Education, should be men-
tioned. The following can inter alia be considered:

Principles for curriculation and examining

General policy in connection with tertiary education

Macroeducational research and development which can be undertaken by the Human Sciences Research Council for the South African Council for Education.

Only broad general principles should be drawn up for the macropolicy which may include consideration of the above-mentioned alternatives, or at least components of them.

It is not practicably possible to handle the education of too many language groups in one department and as far as delimitation on the second level is concerned, an alternative is suggested:

The executive functions in respect of formal and non-formal education at the pre-primary, primary and secondary school level are the responsibility of the second management level.

Of the two alternative possibilities, i.e. regional or ethnic delimitation, the latter alternative is supported, with room being left for private schools on the basis of free association.

It is desirable that certain functions be further decentralized to subregions of the local level.

Regional advisory committees can be considered. These committees can inter alia

(i) advise the South African Council for Education and the departments concerned on the allocation of funds provided by the central government, and

(ii) advise the departments concerned on specialized assistance which can be supplied to the departments concerned by an ancillary service.

As far as the third level is concerned, I agree with the basic principle as it is presented in Paragraph 3.4.3.

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