

Policy Brief

MARCH 2021

Resourcing the Curriculum Support Core for District Impact: Policy and Practice in Subject Advisor Post Provisioning

Executive Summary

Human capacity constraints in district education offices can negatively affect the ability of advisors to fulfil their mandate. This policy brief draws on research on the post-provisioning, daily responsibilities, and workloads of all General Education and Training (GET) Phase Mathematics and English First Additional Language (EFAL) advisors. An analysis of the research data reveals staff shortages at this level, uneven post-provisioning across provinces and phases, and that advisors' time could be used more effectively. Given the context of decreased real spending in education, it is important to find ways to maximise efficiencies and impact, as well as relieve some of the pressure placed on existing advisors. The research puts forward some suggestions, including encouraging a more strategic application of post-provisioning norms, improving the utilisation of advisors' time by removing duties assigned to them that are beyond their job scope, and through better work coordination, and leveraging technology. At a policy level, this brief recommends that the Amended Policy on the Organisation, Roles and Responsibilities of Education Districts (DBE, 2018) be revisited to provide clarity on Intersen appointments; a phase revealed to be particularly burdened. The brief also calls for further investigation into potential inefficiencies of other sub-directorates/divisions that have focus areas that overlap with the work of advisors. This investigation will help strengthen relevant Departmental job descriptions and policy.

Introduction

Subject Advisor post-provisioning

Subject Advisors play a critical role in facilitating curriculum implementation and in improving teaching and learning in South African schools. In order to fulfil their mandate, it is essential that the Subject Advisory service has sufficient human capacity. This policy brief focuses on General Education and Training (GET) Mathematics and English First Additional Language (EFAL) Subject Advisors working at the district level.

In terms of the post-provisioning of district offices, the 2018 Amended Policy on the Organisation, Roles and Responsibilities of the Education Districts sets out minimum staffing norms for officials involved in district level curriculum support. In order to ensure quality and efficient service delivery, it is critical that each office has the minimum staff complement needed to function effectively. According to the amended policy, the application of the post-provisioning model must consider the norms governing the sizes of districts and circuits, as well as a calculation of the number of staff needed to ensure that an optimal number of visits to schools per

term can be undertaken (DBE, 2018). The minimum staffing norms are an attempt to provide some standardisation across district offices, whilst making space for unique contextual factors. Although a number of contextual factors may have a bearing on these calculations, the policy identifies two particularly relevant factors, in an effort to keep the model simple and equitable; 1) the distances that district officials need to travel to schools, and 2) poverty, whereby emphasis must be placed on no-fee schools that need additional support (DBE, 2018).

In the addendum of the amended policy, the post-provisioning norms for officials involved in district level curriculum support, divide Subject Advisors up by Phase and Subject, with higher numbers of staff recommended for the higher grades, as the number of subjects increases. According to the norms, ideally no advisor should support more than 80 schools. Despite the existence of these policy norms, existing research highlights that many district offices remain understaffed, and that staff shortages in the Subject Advisory services are particularly significant (HRDC, 2014).

Subject Advisor roles and responsibilities

Once appointed in district offices, Subject Advisors form part of the District Curriculum Support Team, which is responsible for informing schools about relevant government policy and supporting policy implementation, consulting with and advising educators on curriculum issues, assisting with the professional development of educators, and providing correct and timely Learner and Teacher Support Material (LTSM) (DBE, 2018).

Detail on the specific roles and responsibilities of Subject Advisors can be found in the 2017 Education Labour Relations Council (ELRC) Collective Agreement. This document describes Senior Education Specialist (SES) officials as 'fieldworkers' and lists six Key Performance Areas (KPA) for the position. According to the document, the job purpose

of an SES is "to interpret, monitor, implement policies in schools and render support and development to educators that fall under their area of responsibility" (ELRC, 2017, p.9).

Whilst existing research on Subject Advisors in South Africa shows that these officials are tasked with multiple work responsibilities, and that most of these responsibilities fall within their expected job scope, there is also evidence of advisors undertaking non-core work activities that fall outside of their mandated responsibilities (see for example, Dilotsohle, Smit and Vreken, 2001).

Research findings and purpose of brief

The findings and recommendations presented in this brief are drawn from the Subject Advisor Profiling Study that was conducted between July 2019 and October 2020. The study focused on profiling all GET advisors supporting the two selected subjects nationally, in order to better understand their roles and responsibilities, their access to resources and support, and their professional development needs and experiences.

This results of the Subject Advisor Profiling Study reinforce the research themes highlighted above. The study found human capacity shortages at the GET level, with most advisors reportedly supporting far more schools than the policy norm recommends. An analysis of the post-provisioning of these officials shows that provisioning is uneven, and that particular provinces and phases are more severely affected than others. The results reveal further that advisors' time could be used more effectively by removing tasks assigned to them that are not core to their work, and through improved co-ordination of district and provincial calendars and activities.

The purpose of this brief is to present the study findings related to the post-provisioning, daily responsibilities, and workloads of the targeted advisors, as well as the associated recommendations; drawing attention to key areas of policy significance.

Research Methodology

The Subject Advisor Profiling Study adopted a mixed method approach. Quantitative data were gathered from GET advisors across all 75 districts nationally using a form tool (608/608-100% response rate) and a survey instrument (366/608 advisors-60% response rate). In addition, 29 qualitative interviews were conducted with advisors and Chief Education Specialists (CES) (district and provincial officials) across 6 targeted districts in the Free State (FS), KwaZulu-Natal (KZN) and the Western Cape (WC) (Thabo Mofutsanyana, Xhariep, Pinetown, King Cetshwayo, Metro East & Overberg). The Centre for the Advancement of Science and Mathematics Education (CASME) undertook the study on behalf of the Department of Basic Education (DBE), in partnership with the National Education Collaboration Trust (NECT) and the Zenex Foundation.

Research Results – What did we learn?

Human capacity shortages

The research findings on the post-provisioning of Subject Advisors show that many district offices are understaffed. Although government policy outlines a post-provisioning model and norms to guide Provincial Education Departments (PED) and districts in appointing a minimum number of district advisors, the findings reveal that the model is not clearly understood, and the post-provisioning of advisors across provinces, districts and phases is uneven. Provinces with the highest human capacity shortages at the time of data collection include KZN, the Eastern Cape (EC), and Limpopo. The staff shortages reported on have serious consequences. In addition to advisors not being able to meet their school visit targets, the quality of support provided is compromised when advisors are spread too thin and are responsible for large numbers of schools.

Challenging workloads

At a district level, the allocation of schools to advisors is done in slightly different ways depending on the size of the district and the staff complement. Typically, the allocation of schools is done according to phase and by circuit, and in the Intermediate Phase (IP) and Senior Phase (SP), by subject too. Underperforming schools in impoverished communities are prioritised for support.

The allocation of high numbers of schools to advisors is evident when analysing the data collected from all 75 district offices. As can be seen in Figure 1 below, the large majority of GET Mathematics and EFAL advisors reported being allocated far more schools than the policy model would ideally allow (i.e. 1 advisor per 80 schools). According to the information received from all 608 targeted advisors, roughly half reported supporting a maximum of 100 schools (49% or 300), and a quarter reported supporting between 201 – 500 schools (25% or 154). A further 4% (23) noted that they support over 500 schools. Far fewer advisors reported supporting less than 25 schools (17% or 102), or between 26 – 50 schools (13% or 76).

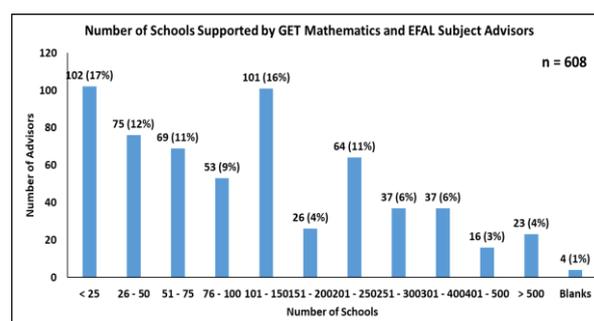


Figure 1: Number of Schools Supported by GET Advisors

Disaggregated by province, the WC and Mpumalanga recorded the highest number of advisors supporting less than 25 schools each (44 advisors and 19 advisors respectively). In the WC, this figure represents almost half (49%) of all advisors appointed at the time of data collection. A further 21% (19) reported supporting between 26 – 50 schools each. In Mpumalanga, this figure represents 36% of all

advisors appointed at the time the data were collected.

Provinces where advisors reportedly support the highest number of schools include KZN, Limpopo, and the EC. In KZN, more than half of advisors reported supporting between 251 – 500 schools (52% or 36), and a further 32% (22) noted that they are assigned over 500 schools each. In Limpopo, just under half of the Subject Advisors (43% or 26) reported supporting between 251 – 500 schools, whilst over a third of advisors in the EC reported supporting between the same number range of schools (35% or 28).

Given the above analysis, it is unsurprising that 78% (284) of the surveyed advisors reported that there are schools that they have never visited. These figures are highest in the KZN, EC and Limpopo provinces (98%, 95% and 97% respectively). Far fewer advisors in the WC (50% or 28) and Mpumalanga provinces (63% or 19) reported never being able to visit all their schools; again supporting the results above that show that advisors in these provinces are assigned fewer schools and thus are more likely to be able to attend to all of them. When asked why they were not able to visit all their assigned schools, the overwhelming majority of surveyed participants stated that they are simply assigned too many schools (65% or 238).

Uneven support across GET Phases

The research findings reveal a particularly interesting provincial trend in the post-establishment of advisors across the IP and SP. Whilst some provinces were seen to have more advisors appointed to support the Intersen phase (with few or no IP & SP advisors), others tended to split the appointment of advisors between the IP and SP (with no Intersen appointments). The KZN, EC, FS, Limpopo, North West and WC provinces reported more, or exclusively, Intersen appointments, whilst the Gauteng, Mpumalanga and the Northern Cape

provinces had separate appointments across the Foundation Phase (FP), IP and SP. According to interviewed provincial CES officials, cost efficiency is the motivation for making more Intersen appointments. Although this practice may be cost effective, it does result in some challenges. Most notably that Intersen advisors are at risk of being overburdened as they are required to support more grades than their peers (and thus more educators), and typically also more schools, as Intersen grades can span across all school types (primary, intermediate, combined, and secondary).

The data collected from all 75 district offices confirms the finding that Intersen advisors support the highest numbers of schools. Figure 2 shows that the large majority of Intersen advisors (69% or 142) reported supporting over 100 schools each. This is far higher than in the FP, IP and SP, where 49% (91), 47% (32), and 39% (39) of advisors respectively reported supporting over 100 schools. It is notable that Intersen advisors were also the only cohort to record advisors supporting over 500 schools each (11% or 23), and this phase also had the most advisors reportedly supporting between 401 – 500 schools (6% or 12).

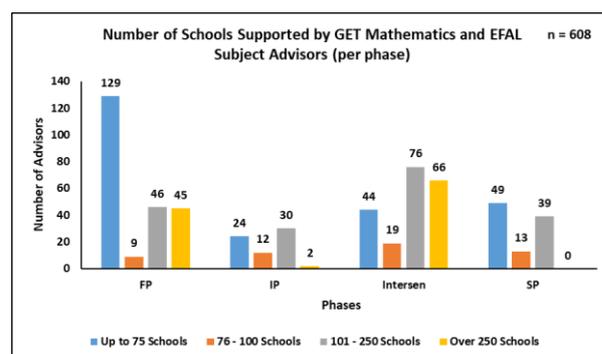


Figure 2: Number of Schools Supported by GET Subject Advisors (by phase)

A second related challenge concerns the way in which the Intersen Phase is constituted, and the implications of this for support provided to the SP. Whilst commonly understood to represent the IP and SP (i.e. Grades 4-9), this is not the case in all districts. Examining the six targeted districts, it is apparent that some

district offices define Intersen as Grades 4-7, with the SP made up of Grade 8-9 (both districts in the WC and the FS adopted this configuration). It is concerning that in these 4 districts, two had no SP advisors. In other words, no advisors were allocated to support Grade 8-9 (Xhariep in the FS and Overberg in the WC). According to some of the interviewed WC district and provincial officials, this particular Intersen configuration has been applied as a cost saving strategy. These WC interviewees explained that in the WC, Intersen advisors support Grades 4- 7 and Grades 8&9 are supported by Further Education and Training (FET) advisors. The challenge with this post-provisioning arrangement is that even though FET subject specialists are assigned to Grade 8&9, FET advisors reportedly tend to prioritise Grades 10-11, and especially Matric. The interviewed provincial CES in the WC explained further that the province also has a few primary schools that go up to Grade 9, and these tend to be especially neglected as FET advisors do not visit primary schools.

Subject Advisors can be utilised more efficiently

Not only are many district offices understaffed, but the research findings show further that appointed Subject Advisors could be used more efficiently.

The data reveal that advisors are assigned multiple work responsibilities; most of which are undertaken on-site in schools and focus on monitoring and supporting curriculum delivery. As can be seen in Figure 3 below, the survey data reveal that school visits, conducting workshops, and undertaking administration and reporting duties take up the majority of advisors' working hours. Professional development activities, materials development, and meetings also reportedly take up a considerable amount of advisors' time.

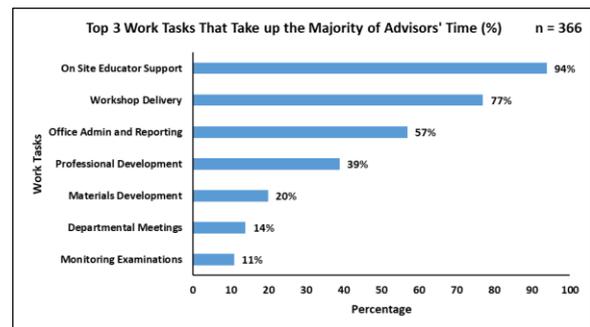


Figure 3: Top 3 Work Tasks that take up the Majority of Advisors' Time

Whilst it is unsurprising that advisors reported spending most of their time on their core functions (i.e. providing curriculum monitoring and support to educators), the data suggests two areas where advisors' time could be used more efficiently.

The first area concerns the amount of time that advisors reportedly spend on office administration, reporting and departmental meetings. As seen in Figure 3, 'office administration' was listed by 57% of survey participants as one of the top 3 work tasks that take up the majority of their time. Similarly, 'departmental meetings' was listed by 14% to the same question. In particular, the data reveal the need for better co-ordination and communication between district and provincial offices in terms of scheduling departmental meetings and activities. Many interviewed and surveyed Subject Advisors complained that their school visits are compromised when they are asked to attend meetings or training workshops on new programmes without adequate warning. Calendar and schedule clashes reportedly occur, and district and provincial priorities often trump planned school visits. Conflicting schedules are exacerbated by the large number of programmes that some districts are reportedly implementing simultaneously.

The second area of concern relates to the amount of time advisors spend on non-core activities. The study reveals some evidence that advisors are conducting duties that are beyond their job and/or subject scope. The most common task mentioned by participants

was the monitoring of the NSC examinations (see Figure 3). In the survey, 11% of advisors listed the monitoring of examinations as one of the top three tasks that take up the majority of their working hours (keeping in mind these assessments are held twice a year – trials and finals). In fewer cases, interviewed Subject Advisors also reported being involved in progression and promotion activities (2 advisors), conducting school functionality assessments (reporting beyond curriculum implementation) (1 advisor), and supporting

additional subjects when they are asked to support schools as part of multidisciplinary teams (3 advisors). Stretching advisors to assist in areas/tasks outside of their mandate is largely attributed to human capacity shortages in district offices. However, having advisors engage in these activities, even if they do not take up the majority of their time, still takes time away from their core work in schools.

Key Findings Summary

- Many district offices are understaffed. Provinces with the highest human capacity shortages at the time of data collection include KZN, the EC, and Limpopo
- The majority of GET Subject Advisors were seen to be assigned too many schools to adequately support, and as a result, school visit targets are often unmet
- Support provided across the GET phases is uneven. Advisors supporting at the Intersen level were seen to be particularly overburdened, and a lack in uniformity in the way in which the Intersen Phase is configured can, in some cases, leave less support for the SP
- Although most of advisors' daily responsibilities were within their core duties, they do also reportedly spend a significant amount of time on tasks that fall outside of their job scope (e.g. monitoring Matric examinations). Time spent in schools is further compromised by a lack of co-ordination between provincial and district calendars and activities

Research Recommendations

Given these key findings, and the current context of decreased real spending in education and tight budget constraints, the research puts forward a number of recommendations to maximise the efficiencies and impact of the current advisors, as well as relieve some of the pressure placed on them caused by staff shortages.

Explore ways to better implement the post provisioning model in provinces

The results show the need for clearer guidance on the role of provinces in applying the model and norms. Districts need to be empowered to make a case for additional staff

and they need to be confident in communicating this to their PEDs.

Make strategic appointments

Given that it not possible to appoint large numbers of new advisors, is argued that these appointments should be more strategically focused to address the uneven distribution of advisors in particular provinces and phases:

- Staff shortages in the KZN, EC and Limpopo provinces need to be addressed;
- Three provinces (Gauteng, Northern Cape and Mpumalanga) have IP advisors separate from SP ones. It is recommended that other provinces

consider this approach, as it tends to provide dedicated support to a phase.

Improve utilisation of Subject Advisors' time

Remove duties that fall outside of advisors' job scope. If possible, reallocate these duties to other officials or sub-directorates they are more appropriately placed (e.g. Circuit Managers or the Further Education and Training (FET) Examinations Directorate). Improve the co-ordination of district and provincial calendars and activities.

Information and Communication Technology (ICT) enhanced educator support

Subject advisors should be capacitated on how to effectively use ICTs and digital tools and resources to better coach, mentor, and support schools and educators. By strengthening virtual support (and blended models), advisors will be able to reach a greater number of educators in a more efficient and cost-effective manner; alleviating challenges associated with transportation and human capacity shortages within the system. Increased uptake and use of digital tools that support evidence based planning and decision-making (e.g. SA-SAMS and Tripe D Dashboard) can also improve efficiencies and impact.

System strengthening

The work of providing curriculum implementation support can be made less demanding by strengthening the internal support provided to educators by School Management Teams (SMT), particularly the Departmental Heads. Peer learning, through the promotion of Professional Learning Communities (PLC), could also be driven within the school by school staff, to further enhance knowledge and skills transfer. The education system can also be further strengthened by improving initial teacher education. It is recommended that initial teacher education curricula are standardised, modernised and include a substantial component of digital learning.

Policy Implications: Call to Action

National minimum staffing norms and the Intersen Phase

The research reveals a practice across some provinces and districts of appointing advisors to provide curriculum implementation support at the Intersen level (rather than having separately appointed, or fewer appointed, IP and SP advisors). This is reportedly undertaken as a cost saving measure. However, it overburdens these advisors and diminishes their ability to support the schools under their care. The Amended Policy on the Organisation, Roles and Responsibilities of the Education Districts (DBE, 2018) sets out minimum staffing norms for officials involved in district level curriculum support. These norms do include an Intersen Phase, hence the post-provisioning of Intersen advisors emerges as a widespread, unwritten policy practice driven by economic factors, rather than pedagogical arguments. From a pedagogical perspective, it is best practice to have qualified advisors supporting particular phases, as these advisors should have phase and subject specific expertise that is sensitive to the knowledge and skills that learners in that particular phase need to acquire. A further complication arises from the different ways in which districts and provinces define the Intersen Phase. The research findings show that in some districts the Intersen Phase spans Grades 4-7. This can leave insufficient support for Grades 8 and 9 – two crucial grades that are recognised as a key transition point for learners, yet are often overlooked for support.

In light of these findings, it is recommended that the Amended Policy on the Organisation, Roles and Responsibilities of the Education Districts (DBE, 2018) be revisited to provide clarity on the minimum staffing norms across the various phases, and to make clear the DBE's stance on Intersen appointments. Sound pedagogical arguments should be made to demonstrate the problems with making Intersen appointments, and PEDs and

districts should be discouraged from interpreting the policy norms in this way.

Addressing overlaps and inefficiencies in the organisation, roles and responsibilities of Education Districts

It is important to note the shared goal of PEDs, district and circuit offices; to ensure quality education. There are many parts of the education system that need to be supported in order to achieve this goal, including school management and governance, financial and administrative functions, and strengthening curriculum implementation. Whilst Subject Advisors have a clear mandate to focus on the latter, it is significant to point out that supporting curriculum delivery is actually part of the mandate of all district and circuit offices, i.e. various sub-directorates/teams and other officials, such as Circuit Managers, all have a part to play. This makes sense and ideally all district and circuit staff should work together and support each other in meeting their shared goals. However, in practice this can result in an overlap of activities, which is exacerbated in offices where there are staff shortages.

The research draws attention to areas where advisors are being tasked with responsibilities that fall outside of their official job description. Human capacity constraints are a factor, but the research report also calls for further investigation into potential inefficiencies of other sub-directorates/divisions in the system that have focus areas that overlap with the work of advisors e.g. Teacher Development and Examinations. An investigation of this nature

is thus recommended to guide the strengthening of DBE job descriptions and policy on the organisation of district offices so that areas of overlap are clearly identified and work tasks clearly delineated.

References

Department of Basic Education. (2018). *National Education Policy Act 1996 (Act No. 27 of 1996): Amended Policy on the Organisation, Roles and Responsibilities of Education Districts*. 19 January 2018.

Dilotothle, K. E., Smit, J. J. A. and Vreken, N. J. (2001). The Perceived Roles and Functions of School Science Subject Advisors. *South African Journal of Education*. 21(4), pp. 305-310.

Education Labour Relations Council. (2017). *Job Descriptions for Office Based Educators*. [Accessed on 15 October 2020 <file:///C:/Users/Tamlynn/Documents/SAP%20Study/Reporting/Second%20Draft%20-%20Sept%202020/Job%20Descriptions_Office%20Based%20Educators_May2017%20(1).pdf.>].

Human Resources Development Council of South Africa. (2014). *Assessing the Capacity of the District Office to Implement National Policies and Programmes*. 28 November 2014. [Accessed on 15 October 2020 <<http://hrdcsa.org.za/wpcontent/uploads/researchreports/District%20Review%20Research%20Reportfor%20submission%20to%20HRDC.pdf>>].