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GOVERNMENT NOTICE

Education, Department of*Government Notice*

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GOVERNMENT NOTICE

DEPARTMENT OF EDUCATION

No. 695

26 July 2001

NATIONAL EDUCATION POLICY ACT, 1996 (ACT NO. 27 OF 1996)

POLICY ON WHOLE-SCHOOL EVALUATION.

I, Kader Asmal, Minister of Education, hereby determine national policy in terms of *Section 3(4)(l) of the National Education Policy Act, 1996 (Act No. 27 of 1996)*, relating to curriculum frameworks, core syllabuses and education programmes, learning standards, examinations and the certification of qualifications, that the policy on Whole-School Evaluation (Schedule 1) be declared national policy.

I further give notice in terms of *Section 7* of the said Act that this policy is obtainable upon written request from the Director-General, Department of Education, Private Bag X895, Pretoria, 0001. For attention Dr N Mgijima at telephone (012) 312-5118/9 or fax 012 326 2191.

Professor Kader Asmal, MP

Minister of Education

Schedule 1



DEPARTMENT OF EDUCATION

THE NATIONAL POLICY ON WHOLE-SCHOOL EVALUATION

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MINISTER'S FOREWORD

Assuring quality of the education system is the overriding goal of the Ministry of Education. This National Policy on Whole-School Evaluation introduces an effective monitoring and evaluation process that is vital to the improvement of quality and standards of performance in schools. The adopted model is radically different from the previous school inspection system carried out in South Africa under the apartheid regime. Together with the accompanying guidelines, this Policy prescribes an approach that is built upon interactive and transparent processes. These processes include school self-evaluation, ongoing district-based support, monitoring and development and external evaluations conducted by the supervisory units.

The Policy places particular emphasis on the need to use objective criteria and performance indicators consistently in the evaluation of schools. Recognising the importance of schools as the place in which the quality of education is ultimately determined, focus is primarily on the school as a whole rather than simply on individuals and their performance. The multi-sources of evidence that are used, will enable valid and reliable judgements to be made and sound feedback to be provided both to schools and to the decision-makers. The findings must be used to re-orientate efforts towards improving the quality and standards of individual and collective performance. They should complement other initiatives to improve the work of schools, such as developmental appraisal for educators. This makes the model less punitive and more supportive, with a feedback mechanism that enables schools and their support structures to agree on improvement targets and developmental plans.

Throughout the development of this Policy and its accompanying documentation, the Ministry has enjoyed the co-operation and support of many interest groups, education authorities, organisations and our provincial colleagues. I would like to thank all of them.

Professor Kader Asmal, MP
Minister of Education
June 2001

SECTION 1

BACKGROUND AND CONTEXT

1.1 Introduction

- 1.1.1 For many years, there has been no national system of evaluating the performance of schools, and there is no comprehensive data on the quality of teaching and learning, or on the educational standards achieved in the system. As a result, the National Policy for Whole-School Evaluation is being introduced. This complements other quality assurance initiatives conducted under the aegis of systemic evaluation, namely; accreditation of providers, programme and service reviews and monitoring learning achievements. It should also align with Developmental Appraisal for Educators so that educators are confident that the features of good practice sought in whole-school evaluation are the same as those encouraged through appraisal and development programmes.
- 1.1.2 The National Policy on Whole-School Evaluation has been designed to ensure that school evaluation is carried out according to an agreed national model. It sets out the legal basis for school evaluation, its purposes, what is to be evaluated and who can carry out evaluations. It also provides guidance on how evaluation should be conducted. It further sets out how the evaluation process should be administered and funded. The Policy indicates ways in which very good schools should be recognised and under-performing schools supported. It makes clear the links between those at national and provincial level who are responsible for the quality of education, and supervisors, schools and local support services.
- 1.1.3 This Policy is aimed at improving the overall quality of education in South African schools. It seeks to ensure that all our children are given an equal opportunity to make the best use of their capabilities. As a process, whole-school evaluation is meant to be supportive and developmental rather than punitive and judgmental. It will not be used as a coercive measure, though part of its responsibility will be to ensure that national and local policies are complied with. Its main purpose is to facilitate improvement of school performance through approaches characterised by partnership, collaboration, mentoring and guidance. The Policy also contains a built-in mechanism for reporting findings and providing feedback to the school and to various stakeholders - the National and Provincial Education Departments, parents and society generally - on the level of performance achieved by schools.
- 1.1.4 The Policy is supported by national guidelines, criteria for evaluation, and instruments that have to be used by trained and accredited supervisors in order to ensure consistency in the evaluation of schools. These also provide the means by which schools can carry out self-evaluation and so enter into a fruitful dialogue with supervisors and support services.

- 1.1.5 Whole-school evaluation is not an end in itself, but the first step in the process of school improvement and quality enhancement. The National Policy on Whole-School Evaluation is designed to achieve the goal of school improvement through a partnership between supervisors, schools and support services at one level, and national and provincial governments at another.

1.2 Education policy and legislative context

- 1.2.1 The transformation of education in South Africa emphasises the right of all to quality education (Education White Paper, 1995). The first intent is to redress the discriminatory, unbalanced and inequitable distribution of the education services of the apartheid regime, and secondly to develop a world-class education system suitable to meet the challenges of the 21st century.
- 1.2.2 According to the National Education Policy Act (No.27 of 1996), the Minister is mandated to direct that standards of education provision, delivery and performance are monitored. Evaluations need to be carried out under the aegis of the National Department annually or at specified intervals, with the object of assessing progress in complying with the provisions of the constitution and with national education policy. This Act also specifies that, should the evaluation reveal that a province is not complying with the provisions of the constitution or national education policy, the Political Head of Education in the affected province has to account to the Minister in writing within 90 days.
- 1.2.3 Similarly, the Assessment Policy, gazetted in December 1998, provides for the conducting of systemic evaluation at the key transitional stages, viz. Grade 3, 6 and 9. The main objective is to assess the effectiveness of the entire system and the extent to which the vision and goals of the education system are being achieved.
- 1.2.4 Also, the Further Education and Training (FET) Act (No.98 of 1998), makes it obligatory for the Director-General, subject to the norms set by the Minister, in terms of the National Education Policy Act, to assess and report on the quality of education provided in the FET Band.
- 1.2.5 The South African Qualifications Authority (SAQA) Act of 1995, requires that Education and Training Quality Assurance (ETQA) bodies be established for the purpose of monitoring and auditing achievements in terms of national standards and qualifications.
- 1.2.6 In line with the above legal provisions, this Policy elaborates on the responsibilities of the Minister with regard to the conduct of whole-school monitoring and evaluation. It confirms that external whole-school evaluation is an integral part of the new quality assurance approach.
- 1.2.7 The shift in terminology from 'inspection' to 'whole-school evaluation' is important. Whole-school evaluation encapsulates school self-evaluation as well as external evaluation. It also provides for schools to receive advice and support in their continual efforts to improve their effectiveness. It does not interfere in any way with existing

activities and agreements, for example, Systemic Evaluation and the Developmental Appraisal System. Part of its purpose is to evaluate the effectiveness with which such initiatives are being implemented and provide information aimed at strengthening their contribution to educational improvement.

- 1.2.8 The focus is on both internal monitoring and external evaluation, i.e. self-evaluation by the school and external evaluation by the supervisory units, and the mentoring and support provided by the district-based support teams.

SECTION 2

KEY ELEMENTS OF THE POLICY

2.1 Aims

2.1.1 The principal aims of this Policy are also integral to the supporting documents, the guidelines and criteria. They are to:

- (a) Moderate externally, on a sampling basis, the results of self-evaluation carried out by the schools;
- (b) Evaluate the effectiveness of a school in terms of the national goals, using national criteria;
- (c) Increase the level of accountability within the education system;
- (d) Strengthen the support given to schools by district professional support services;
- (e) Provide feedback to all stakeholders as a means of achieving continuous school improvement;
- (f) Identify aspects of excellence within the system which will serve as models of good practice and;
- (g) Identify the aspects of effective schools and improve the general understanding of what factors create effective schools.

2.2 Whole-school evaluation and quality assurance

2.2.1 Whole-school evaluation is the cornerstone of the quality assurance system in schools. It enables a school and external supervisors to provide an account of the school's current performance and to show to what extent it meets national goals and needs of the public and communities. This approach provides the opportunity for acknowledging the achievements of a school and for identifying areas that need attention. Whole-school evaluation implies the need for all schools to look continually for ways of improving, and the commitment of Government to provide development programmes designed to support their efforts.

2.2.2 Effective quality assurance within the National Policy on Whole-School Evaluation is to be achieved through schools having well-developed internal self-evaluation processes, credible external evaluations and well-structured support services.

2.3 Principles

2.3.1 The Policy is based on the following principles:

- (a) The core mission of schools is to improve the educational achievements of all learners. Whole-school evaluation, therefore, is designed to enable those in schools, supervisors and support services to identify to what extent the school is adding value to learners' prior knowledge, understanding and skills;
- (b) All members of a school community have responsibility for the quality of their own performance. Whole-school evaluation intends to enable the contribution made by staff, learners and other stakeholders to improve their own and the school's performance, to be properly recognised;
- (c) All evaluation activities must be characterised by openness and collaboration. The criteria to be used in evaluating schools, therefore, must be made public;
- (d) Good quality whole-school evaluation must be standardised and consistent. The guidelines, criteria and instruments must ensure consistency over periods of time and across settings;
- (e) The evaluation of both qualitative and quantitative data is essential when deciding how well a school is performing. For this reason, whole-school evaluation is concerned with the range of inputs, processes and outcomes. These are associated with, for example, staffing and physical resources, human and physical, the quality of leadership and management, learning and teaching, and the standards achieved by learners;
- (f) Staff development and training is critical to school improvement. A measure used by whole-school evaluation in judging a school's performance is the amount and quality of in-service training undertaken by staff and its impact on learning and standards of achievement. In this way whole-school evaluation will make an important contribution to securing well-focused development opportunities for school staff;
- (g) Schools are inevitably at different stages of development. Many factors contribute to this. A basic principle of this policy is to seek to understand why schools are where they are and to use the particular circumstances of the school as the main starting point of the evaluation. The policy recognises that schools in disadvantaged areas, for example, must not be disadvantaged in terms of whole-school evaluation.

2.4 Approach

- 2.4.1 The approach is designed to help schools measure to what extent they are fulfilling their responsibilities and improving their performance. The means of achieving this are through:

- (a) School-based self-evaluation;
- (b) External evaluation by the supervisory unit personnel trained and accredited to evaluate schools;
- (c) Adequate and regular district support leading to professional development programmes designed to provide assistance and advice to individual staff members and schools as they seek to improve their performance;
- (d) An agreed set of national criteria to ensure a coherent, consistent but flexible approach to evaluating performance in the education system;
- (e) Published written reports on the performance of individual schools;
- (f) Annual reports published by provinces and the Ministry on the state of education in schools.

2.5 Ethics and appeals

2.5.1 Through the legal responsibilities bestowed on the Minister of Education, accredited supervisors have the right to enter any school and carry out an evaluation. In doing so, they are expected to observe certain ethical issues and abide by the prescribed code.

2.5.2 The evaluation and monitoring teams need to be fastidious in observing ethical procedures in their work. They are expected to abide by a code of practice which will ensure that they:

- (a) Act professionally towards everyone in the school;
- (b) Communicate openly with the principal and staff of the school while ensuring confidentiality in relation to the school and individuals;
- (c) Evaluate objectively the education provided by the school, avoiding the influence of preconceived ideas and practices;
- (d) Ensure that an appropriate sample of evidence is collected and analysed fairly;
- (e) Provide clear feedback to the school during and as soon as possible after an evaluation;
- (f) Be flexible in response to the different and sometimes changing circumstances of schools, whilst recognising the importance of reporting honestly and fairly to the public at large;
- (g) Carry out evaluations with integrity, treating all those they meet with courtesy and sensitivity;
- (h) Share the principles and procedures of whole-school evaluation with those to be evaluated;
- (i) Be impartial when evaluating a school's performance.

- 2.5.3 It is expected that all school staff and governors will reciprocate the good conduct of supervisors by acting in an open, honest and supportive manner during supervisor visits and evaluations. This will ensure that Whole-School Evaluation is the success it deserves to be and that all those associated with our schools, including learners, benefit to the greatest extent.
- 2.5.4 Schools have a right to register a complaint if they believe that they have been treated unfairly. In the first instance, the school should raise any complaints with the supervisors' team leader, preferably during the evaluation or at the subsequent feedback. The team leader has a duty to try to resolve quickly any issues raised. If the school continues to feel that supervisors have not acted according to the procedures laid down by the National Policy, the Principal can complain to the Head of Department in the Province. This must be done in writing within two working weeks of the school receiving the written evaluation report. During that period, the report will not be published. Where the Head of Department and the Political Head of Education are advised by the independent complaints body that the school has no basis for complaining, the original report will be published. This will normally occur within two weeks of the complaint being received. If the Head of Department is advised that the school has a justifiable complaint, a further evaluation must be arranged within six months of the complaint being made and a new report issued.
- 2.5.5 Complaints can be registered with the Ministry only in the most extreme circumstances and after the second evaluation has been carried out. At this stage, the Ministry will establish an independent body to consider the evidence and become the final arbiter.

2.6 Areas for evaluation

The following are the key areas of evaluation:

1. Basic functionality of the school;
2. Leadership, management and communication;
3. Governance and relationships;
4. Quality of teaching and learning, and educator development;
5. Curriculum provision and resources;
6. Learner achievement;
7. School safety, security and discipline;
8. School infrastructure;
9. Parents and community.

2.7 The use of indicators

Evaluation will be based on indicators covering inputs, processes and outputs.

2.7.1 **INPUTS** - what the school has been provided with in order to carry out its task

The **input indicators** include the main characteristics of each grade of learners, the school's infrastructure, funding and professional and support staff. For example:

- (a) The main characteristics of each cohort of learners when they arrive at the school:
 - i. Socio-economic background;
 - ii. Attainment at entry;
 - iii. Range of languages;
 - iv. Numbers by age and gender per school and class.
- (b) Physical resources:
 - i. Classrooms;
 - ii. Common purpose rooms and areas;
 - iii. External premises;
 - iv. Teaching aids, materials and equipment.
- (c) Professional and support staff:
 - i. Numbers by gender;
 - ii. Qualifications and experience;
 - iii. Educator development and capacity building.
- (d) Funding
 - i. Ministry
 - ii. Province
 - iii. Learners
 - iv. Other sources

2.7.2 **PROCESSES** - how the school seeks to achieve its goals

Process indicators show how well the school seeks to achieve its goals. These include the effectiveness with which schools try to ensure effective governance, leadership and management, safety and security measures, and the quality of teaching. For example:

- (a) What the school does to ensure it functions smoothly;
- (b) How the leadership and management of the school is directed to achieve the school's goals;
- (c) How school governance is conducted;
- (d) How the school ensures quality teaching, curriculum planning, and effective assessment of what learners are learning;

- (e) The willingness of all school staff and governors to carry out conscientiously and effectively any responsibility they are given;
- (f) The school's success in encouraging learners to carry out conscientiously and effectively any responsibility they are given, including attendance and punctuality;
- (g) What the school does to ensure security and safety;
- (h) Language of instructions;
- (i) What support and guidance the school provides to help learners develop intellectually and personally;
- (j) What the school does to appraise staff and to help them develop their skills and effectiveness;
- (k) How the school seeks to encourage parental and community involvement;
- (l) How the school manages its resources;
- (m) What the school does to ensure the use and development of information and communication technology for both curriculum and management purposes;
- (n) Guidance and counselling.

2.7.3 OUTPUTS - what the school achieves

Output indicators include achievements in academic standards, standards of behaviour and rates of punctuality and attendance. For example:

- (a) Learners' standards of attainment at the end of each stage of their education;
- (b) What progress learners have made while at school;
- (c) The quality of learners' response to teaching and to the school's general provision;
- (d) Learners' standards of behaviour;
- (e) The orderliness of the school;
- (f) The condition of school accommodation and furnishings and the effectiveness with which they are used;
- (g) The commitment to the school and its learners of parents and the community;
- (h) The efficiency with which the school uses its resources/funding;
- (i) The provision for safety and security.

2.8 Performance ratings

The overall school performance will be rated using the following scale:

- | | | |
|---|---|----------------------|
| 5 | → | Outstanding |
| 4 | → | Good |
| 3 | → | Acceptable |
| 2 | → | Needs improvement |
| 1 | → | Needs urgent support |

Where it is not possible to give a rating, 0 will be used.

2.9 Evaluation process

- 2.9.1 The Whole-school Evaluation cycle includes pre-evaluation surveys/visits, school self-evaluation, detailed on-site evaluation, post-evaluation reporting and post-evaluation support.
- 2.9.2 Each supervisory team will have a team leader who has the responsibility to build a brief profile about the general level of functionality of the school and to share with the school the procedures that will be followed by the evaluation team. The team leader also has overall responsibility for the evaluation process and the conduct of the supervisors.
- 2.9.3 Supervisory teams will comprise accredited supervisors capable of evaluating the nine focus areas. Members should have the expertise to evaluate at least one subject/learning area and have an awareness of the key elements of good provision for Learners with Special Educational Needs (LSEN).
- 2.9.3 The number of supervisors will normally be within the range of four to six, depending on the size of the school and the resources available.
- 2.9.4 Evaluations will normally be conducted between three and four days of the week, depending on the size of school.
- 2.9.5 An evaluation will result in a published written report and contain recommendations designed to help the school continue to improve.
- 2.9.6 A school will be helped by district support services to formulate and implement an improvement plan based on the recommendations in the report and provide the school with support as it seeks to implement the plan.

SECTION 3:**RESPONSIBILITIES AT DIFFERENT LEVELS****3.1 Ministry**

The Ministry undertakes to:

- 3.1.1 Provide, within its annual education budget, funding that will be distributed to all the provinces as a conditional grant specifically for school evaluation activities and for supporting schools in their efforts to implement the recommendations of the evaluation report;
- 3.1.2 Set up an appropriate national body to oversee the development, administration and periodic review of the National Policy on Whole-School Evaluation i.e. policy, guidelines and instruments, in response to changing circumstances;
- 3.1.3 Be responsible for developing and implementing a policy for evaluating provincial and district performance in contributing to the implementation of the whole-school evaluation policy and the support they give to improving performance in schools;
- 3.1.4 Ensure that the evaluation system is administered effectively by providing professional guidance and support to provinces on how the evaluations will be organised and conducted. For schools needing emergency interventions, the Ministry will discuss with the relevant province what special arrangements need to be made;
- 3.1.5 Decide on the national sample of schools to be evaluated and determine the length of evaluation cycles. In deciding on the sample, the Ministry will use criteria that include the school's location (rural/urban); size (big/small school); gender (i.e. co-educational/single sex);
- 3.1.6 Once the sample has been decided, inform the provinces of the number and sample of schools to be evaluated;
- 3.1.7 Be responsible for overseeing the training, accreditation and registration of supervisors;
- 3.1.8 Create systems for monitoring the quality of whole-school evaluations and the work of the supervisors;
- 3.1.9 Remove from the register of school evaluators those supervisors who fail to carry out their responsibilities satisfactorily;
- 3.1.10 Collect certain raw data gathered through school evaluations from the provinces in order to enable the Minister to construct an annual report for Parliament. This data will also be used to guide the formulation and review of education policy;
- 3.1.11 Maintain, through the Quality Assurance Directorate in the national Department of Education, an accessible national database on the findings from whole-school

monitoring and evaluation that can be used to refine indicators and provide benchmark data.

3.2 Provinces

The Provinces will be responsible for:

- 3.2.1 Identifying a competent, well-trained and accredited supervisory unit, with appropriate administrative support, capable of ensuring that the evaluation of schools is carried out effectively;
- 3.2.2 Organising the work of the supervisory unit so that the annual national sample of schools can be evaluated;
- 3.2.3 Putting in place policies and personnel (support services) designed to provide appropriate administrative support, advice, and guidance to help schools respond to the recommendations emanating from external evaluations;
- 3.2.4 Ensuring appropriate provision for updating the supervisory unit, support services and schools under its jurisdiction in matters concerned with whole-school evaluation;
- 3.2.5 Ensuring that sufficient funds are available within their annual education budget to enable support services and schools to carry out developmental activities in accordance with the National Policy. Provinces will be required to show that this responsibility is being carried out equitably by publishing how these funds are allocated and what criteria are used when distributing funds to different schools;
- 3.2.6 Providing a budget to help schools respond effectively to the recommendations made in an evaluation report, and putting in place contingency plans for dealing with schools that need urgent support. This will include providing appropriate in-service training programmes;
- 3.2.7 Ensuring that all schools under their jurisdiction are fully aware of the implications of the National Policy and Guidelines on Whole-School Evaluation and of their responsibilities in relation to it;
- 3.2.8 Making arrangements for monitoring the quality of professional support services in their districts and dealing with any shortcomings displayed by district support teams;
- 3.2.9 Ensuring that an appropriate Provincial database is established. It must be fully accessible, capable of providing information that can be used to enable it to benchmark its performance in comparison with other Provinces, and linked to the Ministry's database on quality assurance;
- 3.2.10 The Head of Department in consultation with the Political Head of Education will be responsible for publishing the provincial report at that level.

3.3 Provincial supervisory units

Supervisory units will be responsible for:

- 3.3.1 The day-to-day operations of whole-school evaluation under the direction of the Head of the Provincial Department, but within a nationally co-ordinated framework. This is to ensure synergy and the integration of all activities associated with quality assurance;
- 3.3.2 Carrying out whole-school evaluations in districts that are not their regular stations;
- 3.3.3 Retrieving information from their school evaluation reports that can be used to inform provincial and national reports on the quality of education in South Africa. Making that information available to those that need it in the prescribed manner;
- 3.3.4 Providing assistance to support services from time to time in order to help raise standards, particularly in under-performing schools;

3.4 District support services

The district support services, which need to be teams comprising expertise in general school management, leadership, governance, curriculum, staff development, and financial planning, will take responsibility for:

- 3.4.1 Monitoring and supporting schools in their efforts to raise standards and the quality of educational provision. When a need arises, they must provide relevant information to the provincial supervisory units;
- 3.4.2 Ensuring the availability of adequate transport, travel and subsistence budgets for the district support teams in collaboration with the provincial head office and district office;
- 3.4.3 Co-ordinating staff development programmes in response to educators' individual professional need, the findings of whole-school evaluation, and the requirements of provincial and national policies and initiatives;
- 3.4.4 Guiding schools in the implementation of the recommendations of whole-school evaluation reports;
- 3.4.5 Finding ways of setting up clusters of schools so that approaches to improving the performance of schools can be integrated more efficiently and effectively.

3.5 Schools

The executive authority for the professional management of schools is vested in the principal supported by the school governing body. The principal may delegate to an appointee or

nominee from the staff certain functions, including quality management matters, whenever the need arises. Against this background, the principal will be responsible for:

- 3.5.1 Carrying out an internal evaluation of the school in line with the requirements of the National Policy and Guidelines on Whole-School Evaluation;
- 3.5.2 Co-operating with the evaluation team, especially by providing interviews at appropriate times. This also applies to members of the SGB who may be available during an evaluation;
- 3.5.3 Identifying an evaluation co-ordinator to liaise with the evaluation team during a whole-school evaluation exercise. The co-ordinator will participate in the evaluation process by attending evaluation-team meetings in order to help the team interpret evidence and to clarify any uncertainties. The co-ordinator will not be part of decision-making when the evaluation of the school's performance is made;
- 3.5.4 Granting full access to school records, policies, reports and other documentation, including those of the SGB, during external evaluations conducted by the supervisory units;
- 3.5.5 Producing, in collaboration with the support services and the SGB, an improvement plan in response to recommendations made in the evaluation report within four weeks of the receipt of the written evaluation report. Full consultation with all stakeholders must be part of this process;
- 3.5.6 Sending the improvement plan to the District Head for approval and working with professional support service members assigned to the school in order to implement it;
- 3.5.7 Implementing the improvement plan within the stipulated time frames;
- 3.5.8 Informing parents and other stakeholders, such as the SGB, about the intended evaluation and distributing the written summary with the main conclusions and recommendations of the recent evaluation within one week of its arrival at the school. Where appropriate, Principals should follow this by disseminating information in other ways within two weeks of receiving the report.

SECTION 4

4.1 Improvement Strategies

- 4.1.1 In the case of individual schools, the professional support service must link with the senior management team, the staff and the SGB in order to support the implementation of the quality improvement strategies recommended by the supervisors and identified in the school's improvement plan.
- 4.1.2 The professional support service must support schools through helping them produce a coherent, overall plan of action to address the improvement needs articulated by both school self-evaluation and the external evaluation reports of the supervisors.
- 4.1.3 The professional support service is responsible for retrieving key information from the reports of different schools in a district in order to plan the support and professional development required. This should lead to the provision of an integrated training programme that can be delivered in co-operation with other schools and other role players, such as Teacher Centres; Colleges of Education; Technikons; Universities; Teacher Unions and NGOs.
- 4.1.4 School evaluation reports and improvement plans should naturally lead to district, provincial, and national improvement plans which address areas needing improvements, within specified time frames. In addition, the report will include observations made regarding developmental appraisal strategies, professional growth plans and reports. These reports, on the one hand, form the basis for future reviews and serve as an important tool for self-evaluation at all levels within the province and the country. On the other hand, they will be used to highlight elements of good practices in education in schools and those which require attention.

SECTION 5

5.1 Human capacity and development

- 5.1.1 Training is an essential part of preparation for the new system. It will be designed to ensure that supervisors understand the National Policy and accompanying Guidelines and criteria, and can apply them fairly and consistently. Supervisors will receive a certificate indicating that they have completed the first phase of training
- 5.1.2 Training will also be designed to develop the specific skills and attitudes required by good supervisors.
- 5.1.3 In order to evaluate schools, supervisors must be trained and accredited in accordance with conditions laid down by the Quality Assurance Directorate. Generally, they must be qualified educators who have been teaching for at least five years, and who have undertaken some further training as an educator in order to maintain and improve their skills. In some cases, supervisors may be seconded for up to a period of four years from their normal occupations.
- 5.1.4 Supervisors should be capable of evaluating a specialist subject and on occasions a group of related subjects. They must have been trained to be able to evaluate one or more of the nine focus areas that form the core of whole-school evaluation.
- 5.1.5 Supervisors should be capable of making general statements about the quality of provision for special educational needs (SEN).
- 5.1.6 Supervisors must be trained to be competent enough to aid the development of a school. They should be conversant with school self-evaluation techniques and school improvement plans. They should be able to provide worthwhile recommendations that can aid the school and other groups supporting the school to make effective decisions about its future development.
- 5.1.7 Accredited supervisors will have undergone practical training in schools, and will have been assessed as competent to evaluate all types of schools. On going in-service training will be provided, so that skills in areas such as special educational needs (SEN) can be developed.
- 5.1.8 Once they have received training and been accredited, all supervisors will be registered on the Ministry's database.
- 5.1.9 District support teams will receive initial and going on training so that they are competent to aid the development of a school. They must be conversant with the National Policy on Whole-School Evaluation, school self-evaluation techniques and the formulation of school improvement plans.
- 5.1.10 Training of supervisors and support services will include skills in handling, analysing, and interpreting data, communication and interpersonal skills.

GLOSSARY OF TERMS

Accreditation - means the certification, usually for a particular period of time, of a person, a body or an institution as having the capacity to fulfill a particular function in the quality assurance system.

Certification - recognition by a certificate of the competencies acquired by a supervisor through successfully completing a supervisor's training course.

Competencies - the specific knowledge and skills required by supervisors, which include their ability to conform to their code of conduct.

Curriculum - planned educational experience provided for learners supplied by schools, mainly in lessons but possibly in other circumstances such as educational visits and extra-curricular activities.

District - encompasses district or regional education authority.

Education for learners with special needs (LSEN) - is used to designate all those forms of education, in ordinary and special schools or other settings, which are regarded by their practitioners as constituting explicit means of responding to learners 'special' characteristics and 'needs'.

Ethos - a number of factors, which include the curricular offerings, relationships in the school community, cultural opportunities, leadership etc. which define the school's community spirit.

Evaluation - the means of judging the success of a school's performance based on the criteria in the Evaluation Framework.

Extra-curricular activities - activities, such as trips, visits, school contests, cultural, artistic, sportive and technical-scientific activities that are outside the school's normal timetable provided by the school for learners.

Framework - the Whole-School Evaluation Framework is a package that includes the policy, guidelines and instruments for monitoring and evaluating the performance of the schools.

Improvement Strategies - a planned effort to make better the good and average schools, and to improve the performance of the schools that are performing below the required standards, on an on-going basis.

Judgements - opinions formed by supervisors based on evidence collected through using the criteria in the Evaluation Framework.

Leadership - the capacity to guide the school and those associated with it in the right direction.

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GOVERNMENT NOTICES

GOEWERMENSKENNISGEWINGS

SOUTH AFRICAN REVENUE SERVICE

SUID-AFRIKAANSE INKOMSTEDIENS

No. 696

27 July 2001

DETERMINATION OF PUBLIC BENEFIT ACTIVITIES FOR PURPOSES OF SECTION 18A OF THE INCOME TAX ACT, 1962

By virtue of the power vested in me by section 18A(1)(a) of the Income Tax Act, 1962 (Act No. 58 of 1962), I, Trevor Andrew Manuel, Minister of Finance, hereby determine the following public benefit activities as contemplated in section 30 of that Act, set out in Schedule 1 hereto, to be approved public benefit activities for the purposes of section 18A(1)(a) of that Act.

T. A. MANUEL
Minister of Finance

SCHEDULE 1

1. Welfare and Humanitarian

- (a) The care or counseling of abandoned, abused, neglected, orphaned or homeless children.
- (b) The care or counseling of indigent persons over the age of 60.

2. Health Care

- (a) The prevention of HIV infection or the distribution of information relating to HIV and AIDS.
- (b) The care or counseling of persons afflicted with AIDS/HIV, including the counseling of their families in this regard.

3. Education and Development

- (a) The provision of education by a "school" as defined in the South African Schools Act, 1996 (Act No. 84 of 1996).
- (b) The provision of "higher education" by a "higher education institution" as defined in terms of the Higher Education Act, 1997 (Act No. 101 of 1997).
- (c) "Adult basic education and training", as defined in the Adult Basic Education and Training Act, 2000 (Act No. 52 of 2000), including literacy and numeracy education.
- (d) "Further education and training" provided by a "public further education and training institution" as defined in the Further Education and Training Act, 1998 (Act No. 98 of 1998).
- (e) Training for unemployed persons with the purpose of enabling them to obtain employment.
- (f) The training or education of persons with a permanent physical or mental impairment.
- (g) The provision of bridging courses to enable indigent persons to enter a higher education institution as envisaged in subparagraph (b).

**BEPALING VAN OPENBARE WELDAADSAKTIWITEITE VIR
DOELEINDES VAN ARTIKEL 18A VAN DIE INKOMSTEBELASTINGWET,
1962**

Kragtens die bevoegdheid aan my verleen deur artikel 18A(1)(a) van die Inkomstebelastingwet, 1962 (Wet No. 58 van 1962), bepaal ek, Trevor Andrew Manuel, Minister van Finansies, hiermee in Bylae 1 die volgende openbare weldaadsaktiwiteite soos in artikel 30 beoog, as goedgekeurde aktiwiteite vir die doeleindes van artikel 18A van daardie Wet.

T. A. MANUEL
Minister van Finansies

BYLAE 1

1. Welsyn en Humanitêr

- (a) Die sorg of berading van verlate, mishandelde, verwaarloosde, wees- of hawelose kinders.
- (b) Die sorg of berading van behoeftige persone bo die ouderdom van 60.

2. Gesondheidsorg

- (a) Die voorkoming van MIV infeksie of die verspreiding van inligting ten opsigte van MIV en VIGS.
- (b) Die sorg of berading van persone aangetas deur VIGS/MIV, insluitend die berading van hulle gesinne in die verband.

3. Opvoeding en Ontwikkeling

- (a) Die voorsiening van onderwys deur 'n "skool" soos in die Suid-Afrikaanse Skolewet, 1996 (Wet No. 84 van 1996), omskryf.
- (b) Die voorsiening van "hoër onderwys" by 'n "inrigting vir hoër onderwys" soos in die Wet op Hoër Onderwys, 1997 (Wet No. 101 van 1997), omskryf.
- (c) "Basiese onderwys en opleiding vir volwassenes" soos in die Wet op Basiese Onderwys en Opleiding vir Volwassenes, 2000 (Wet No. 52 van 2000), omskryf, wat geletterdheid en syferkennisopleiding insluit.
- (d) "Verdere onderwys en opleiding" deur 'n "openbare inrigting vir verdere onderwys en opleiding" voorsien soos in die Wet op Verdere Onderwys en Opleiding, 1998 (Wet No. 98 van 1998), omskryf.
- (e) Opleiding vir werklose persone met die doel om hulle in staat te stel om werk te kry.
- (f) Die opleiding of onderwys van persone met 'n permanente fisiese of geestelike aantasting.
- (g) Die voorsiening van oorbruggingskursusse om behoeftige persone in staat te stel om toegang tot inrigtings vir hoër onderwys soos in subparagraaf (b) beoog, te verkry.

No. 697

27 July 2001

**DETERMINATION OF PUBLIC BENEFIT ACTIVITIES FOR PURPOSES
OF SECTION 30 OF THE INCOME TAX ACT, 1962**

By virtue of the power vested in me by section 30(2)(a) of the Income Tax Act, 1962 (Act No. 58 of 1962), I, Trevor Andrew Manuel, Minister of Finance, having regard to the needs, interests and well-being of the general public, hereby determine the following activities set out in Schedule 1 to be of a philanthropic or benevolent nature for the purposes of that section.

T. A. MANUEL
Minister of Finance

SCHEDULE 1

1. Welfare and Humanitarian

- (a) The care or counseling of physically or mentally abused and traumatized persons.
- (b) The care or counseling of abandoned, abused, neglected, orphaned or homeless children.
- (c) The care or counseling of indigent persons over the age of 60.
- (d) The provision of disaster relief.
- (e) The provision of basic human necessities for indigent persons.
- (f) The rescue of persons in distress.
- (g) Rehabilitative counseling and education of prisoners, former

prisoners and convicted offenders.

- (h) The prevention of addiction to, or rehabilitation, care and counseling of persons addicted to, a dependence-forming substance.
- (i) Conflict resolution or the promotion of reconciliation, mutual respect and tolerance between the various peoples of South Africa, where such activity is carried on by an organisation which is primarily funded by donations.
- (j) The protection of the safety of the general public, where such activity is carried on by an organisation which is primarily funded by donations.
- (k) The promotion or protection of family stability, where such activity is carried on by an organisation which is primarily funded by donations.
- (l) The provision of legal services for indigent persons.
- (m) The provision of day care facilities for babies and toddlers of indigent parents.

2. Health Care

- (a) The provision of health care services to indigent persons.
- (b) The care or counseling of terminally ill persons or persons with a permanent physical or mental impairment, including the counseling of their families in this regard.
- (c) The prevention of HIV infection or the distribution of information relating to HIV and AIDS.
- (d) The care or counseling of persons afflicted with AIDS/HIV, including the counseling of their families in this regard.
- (e) The provision of blood transfusion, organ donor or similar services.
- (f) The provision of primary health care education.

3. Land and Housing

- (a) The development, construction, upgrading, conversion or procurement of housing units for the benefit of indigent persons.
- (b) The development, servicing or upgrading of stands for purposes of the activities contemplated in subparagraph (a).
- (c) The provision of residential care for retired persons, substantially all of whom are over the age of 60, where regular meals and nursing services are provided by the organisation carrying on such activity.
- (d) Building and equipping of clinics, community centres or sport facilities for the benefit of the indigent.

4. Education and Development

- (a) The provision of education by a "school" as defined in the South African Schools Act, 1996 (Act No. 84 of 1996).
- (b) The provision of "higher education" by a "higher education institution" as defined in terms of the Higher Education Act, 1997 (Act No. 101 of 1997).
- (c) "Adult basic education and training", as defined in the Adult Basic Education and Training Act, 2000 (Act No. 52 of 2000), including literacy and numeracy education.
- (d) "Further education and training" provided by a "public further education and training institution" as defined in the Further Education and Training Act, 1998 (Act No. 98 of 1998).
- (e) Training for unemployed persons with the purpose of enabling them to obtain employment.
- (f) The training or education of persons with a permanent physical or mental impairment.
- (g) The provision of bridging courses to enable indigent persons to enter a higher education institution as envisaged in

subparagraph (b).

- (h) The provision of school buildings or equipment on land owned by either the State or an organisation approved in terms of section 30 of the Income Tax Act, 1962, carrying on activities as envisaged in subparagraphs (a) to (g).
- (i) Career guidance and counseling services provided to persons attending any school or higher education institution as envisaged in subparagraphs (a) and (b).
- (j) The provision of hostel accommodation to students of an organisation approved in terms of section 30 of the Income Tax Act, 1962, carrying on activities envisaged in subparagraphs (a) to (g).

5. Religion, Belief or Philosophy

- (a) The promotion and/or practice of religion which encompasses acts of worship, witness and community service based on a belief in a deity and a recognised creed.
- (b) The promotion and/or practice of a belief.
- (c) The promotion of, or engaging in, philosophical activities.

6. Cultural

- (a) The advancement, promotion or preservation of the arts, culture or customs, where such activity is carried on by an organisation which is primarily funded by donations.
- (b) The promotion, establishment, protection, preservation or maintenance of areas of historical interest, national monuments, national heritage sites, museums, including art galleries, archives and libraries, where the organisation carrying on any such activity takes reasonable steps to provide access to the indigent.
- (c) The provision of youth development programs, where the

organisation carrying on such activity takes reasonable steps to provide access to the indigent.

7. Conservation, Environment and Animal Welfare

- (a) Engaging in the conservation, rehabilitation or protection of the natural environment, including flora, fauna or the biosphere, where such activity is carried on by an organisation which is primarily funded by donations.
- (b) The care of animals, including the rehabilitation, or prevention of the ill-treatment of animals, where such activity is carried on by an organisation which is primarily funded by donations.

8. Research

Research, including agricultural, economic, educational, industrial, medical, political, social, scientific and technological research, where such activity is carried on by an organisation which is primarily funded by donations.

9. Sport

The administration, development, co-ordination or promotion of sport or recreation in which the participants take part on a non-professional basis as a pastime, where the organisation carrying on such activity takes reasonable steps to provide access to the indigent.

**BEPALING VAN OPENBARE WELDAADSAKTIVITEITE VIR
DOELEINDES VAN ARTIKEL 30 VAN DIE INKOMSTEBELASTINGWET,
1962**

Kragtens die bevoegdheid aan my verleen deur artikel 30(2)(a) van die Inkomstebelastingwet, 1962 (Wet No. 58 van 1962), bepaal ek, Trevor Andrew Manuel, Minister van Finansies, met inagneming van die behoeftes, belange en welvaart van die algemene publiek, hiermee die volgende aktiwiteite in Bylae 1 hierby uiteengesit, as van 'n filantropiese of welwillendheidsaard te wees vir die doeleindes van daardie artikel.

T. A. MANUEL

Minister van Finansies

BYLAE 1

1. Welsyn en Humanitêr

- (a) Die sorg of berading van fisiese of geestelike mishandelde en getraumatiseerde persone.
- (b) Die sorg of berading van verlate, mishandelde, verwaarloosde, wees- of hawelose kinders.
- (c) Die sorg of berading van behoeftige persone bo die ouderdom

van 60.

- (d) Die voorsiening van rampverligting.
- (e) Die voorsiening van basiese menslike noodsaaklikhede aan behoeftige persone.
- (f) Die redding van persone in nood.
- (g) Rehabilitatiewe berading en opvoeding van gevangenes, voormalige gevangenes en veroordeelde misdadigers.
- (h) Die voorkoming van verslawing aan, of rehabilitasie, sorg en berading van persone verslaaf aan, 'n gewoonte-vormende middel.
- (i) Konfliktbeslegting of die bevordering van rekonsiliasie, wedersydse respek en verdraagsaamheid tussen die verskillende mense van Suid- Afrika, waar daardie aktiwiteit uitgevoer word deur 'n organisasie wat primêr deur skenkings befonds word.
- (j) Die beskerming van die veiligheid van die algemene publiek, waar daardie aktiwiteit uitgevoer word deur 'n organisasie wat primêr deur skenkings befonds word.
- (k) Die bevordering of beskerming van gesinstabiliteit, waar daardie aktiwiteit uitgevoer word deur 'n organisasie wat primêr deur skenkings befonds word.
- (l) Die voorsiening van regshulp aan behoeftige persone.
- (m) Die voorsiening van dagsorgfasiliteite vir babas en kleuters van behoeftige ouers.

2. **Gesondheidsorg**

- (a) Die voorsiening van gesondheidsorgdienste vir behoeftige persone.
- (b) Die sorg of berading van persone wat terminaal siek is of persone met 'n permanente fisiese of geestelike aantasting, insluitend die berading van hulle gesinne in die verband.
- (c) Die voorkoming van MIV infeksie of die verspreiding van inligting

ten opsigte van MIV en VIGS.

- (d) Die sorg of berading van persone aangetas deur VIGS/MIV, insluitend die berading van hulle gesinne in die verband.
- (e) Die voorsiening van bloedoortappings-, orgaanskenkings- of soortgelyke dienste.
- (f) Die voorsiening van primêre gesondheidsorgopvoeding.

3. Grond en Behuising

- (a) Die ontwikkeling, oprigting, opgradering, omskakeling of verskaffing van behuisingseenhede vir die voordeel van behoeftige persone.
- (b) Die ontwikkeling, diensverskaffing of opgradering van erwe vir doeleindes van die aktiwiteite in subparagraaf (a) hierbo beoog.
- (c) Die voorsiening van verblyfsorg vir afgetrede persone, wat wesenlik almal bo die ouderdom van 60 is, waar gereelde maaltye en verpleegdienste deur die organisasie wat daardie aktiwiteit beoefen, voorsien word.
- (d) Die bou en toerus van klinieke, gemeenskapsentrums of sportgeriewe vir die voordeel van behoeftiges.

4. Onderwys en Ontwikkeling

- (a) Die voorsiening van onderwys deur 'n "skool" soos in die Suid-Afrikaanse Skolewet, 1996 (Wet No. 84 van 1996), omskryf.
- (b) Die voorsiening van "hoër onderwys" by 'n "inrigting vir hoër onderwys" soos in die Wet op Hoër Onderwys, 1997 (Wet No. 101 van 1997), omskryf.
- (c) "Basiese onderwys en opleiding vir volwassenes" soos in die Wet op Basiese Onderwys en Opleiding vir Volwassenes, 2000 (Wet No. 52 van 2000), omskryf, wat geletterdheid en syferkennisopleiding insluit.

- (d) "Verdere onderwys en opleiding" deur 'n "openbare inrigting vir verdere onderwys en opleiding" voorsien soos in die Wet op Verdere Onderwys en Opleiding, 1998 (Wet No. 98 van 1998), omskryf.
- (e) Opleiding vir werklose persone met die doel om hulle in staat te stel om werk te kry.
- (f) Die opleiding of onderwys van persone met 'n permanente fisiese of geestelike aantasting.
- (g) Die voorsiening van oorbruggingskursusse om behoeftige persone in staat te stel om toegang tot inrigtings vir hoër onderwys soos in subparagraaf (b) beoog, te verkry.
- (h) Die voorsiening van skoolgeboue en toerusting op grond wat behoort aan óf die Staat óf enige organisasie wat ingevolge artikel 30 van die Inkomstebelastingwet, 1962, goedgekeur is, wat aktiwiteite in subparagraawe (a) tot (g) beoog beoefen.
- (i) Beroepsvoorligting en beradingsdienste voorsien aan persone wat skole of inrigtings vir hoër onderwys in subparagraawe (a) en (b) beoog, bywoon.
- (j) Die voorsiening van koshuisverblyf aan studente van 'n organisasie wat ingevolge artikel 30 van die Inkomstebelastingwet, 1962, goedgekeur is, wat aktiwiteite in subparagraawe (a) tot (g) beoog, beoefen.

5. Godsdien, Geloof of Filosofie

- (a) Die bevordering en/of beoefening van godsdien wat dade van aanbidding, getuienis en gemeenskapsdien insluit, gebaseer op 'n geloof in 'n godheid en erkende geloofsbelydenis.
- (b) Die bevordering en/of beoefening van 'n geloof.
- (c) Die bevordering van, of deelname aan, filosofiese aktiwiteite.

6. Kultureel

- (a) Die bevordering, aanmoediging of bewaring van die kuns, kultuur of gewoontes, waar daardie aktiwiteit beoefen word deur 'n organisasie wat primêr deur skenkings befonds word.
- (b) Die bevordering, vestiging, beskerming, bewaring of instandhouding van areas van historiese belang, nasionale monumente, nasionale erfenisterreine, museums, insluitend kunsgalerye, argiewe en biblioteke, waar die organisasie wat die aktiwiteit beoefen alle redelike stappe doen om toegang aan behoeftiges te verleen.
- (c) Die voorsiening van jeugontwikkelingsprogramme, waar die organisasie wat die aktiwiteit beoefen alle redelike stappe doen om toegang aan behoeftiges te verleen.

7. Bewaring, Omgewing en Dierewelsyn

- (a) Deelname aan die bewaring, rehabilitasie of beskerming van die natuurlike omgewing, insluitend flora, fauna of die biosfeer, waar daardie aktiwiteit beoefen word deur 'n organisasie wat primêr deur skenkings befonds word.
- (b) Die versorging van diere, insluitend die rehabilitasie, of voorkoming van die mishandeling van diere, waar daardie aktiwiteit beoefen word deur 'n organisasie wat primêr deur skenkings befonds word.

8. Navorsing

Navorsing, insluitend landbou-, ekonomiese, opvoedingkundige, industriële, mediese, politieke, wetenskaplike en tegnologiese navorsing, waar daardie aktiwiteit beoefen word deur 'n organisasie wat primêr uit skenkings befonds word.

9. Sport

Die administrasie, ontwikkeling, koördinasie of bevordering van sport of ontspanning waaraan die deelnemers op 'n nie-professionele basis as 'n tydverdryf deelneem, waar die organisasie wat die aktiwiteit beoefen redelike stappe doen om toegang aan behoeftiges te verleen.

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