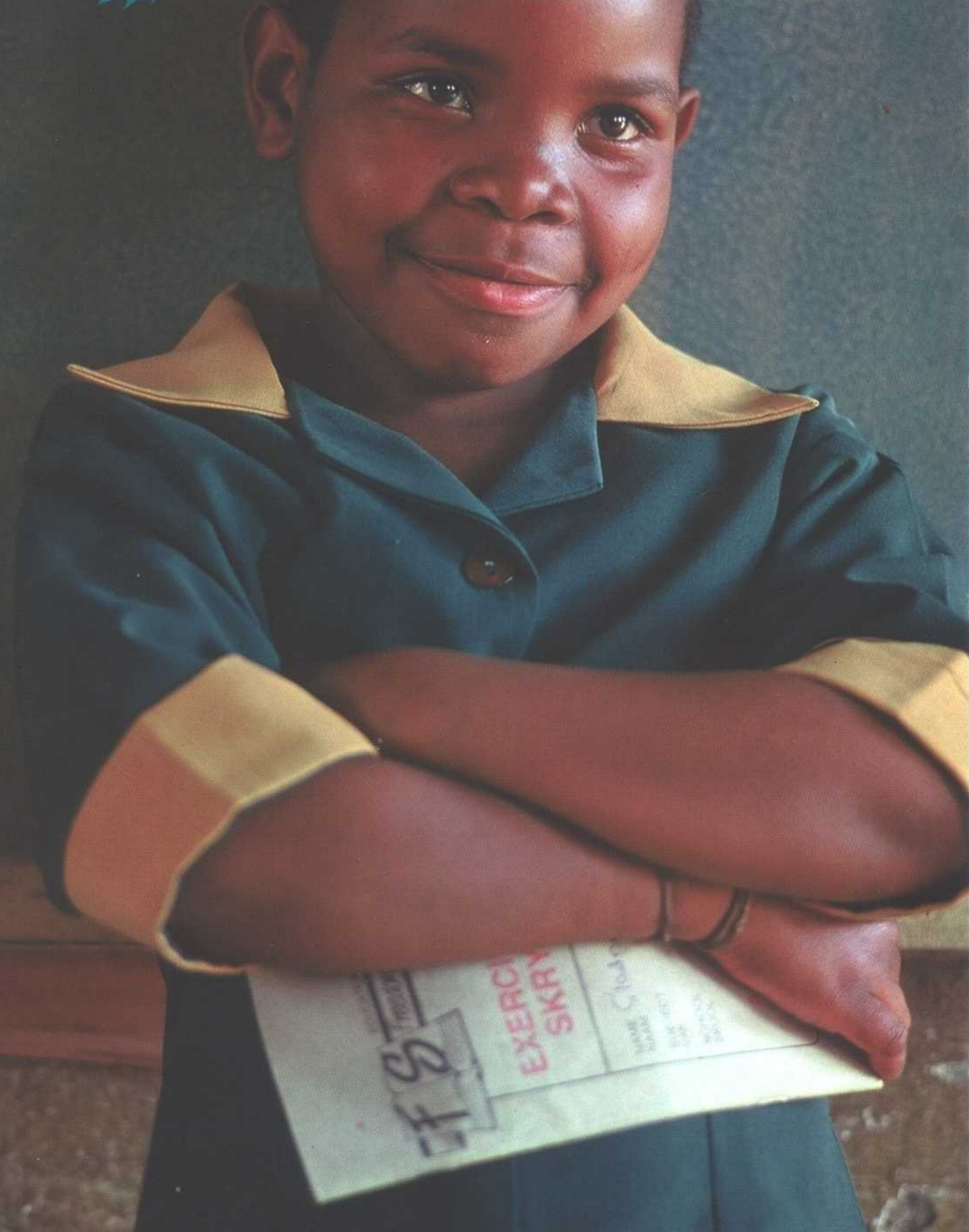
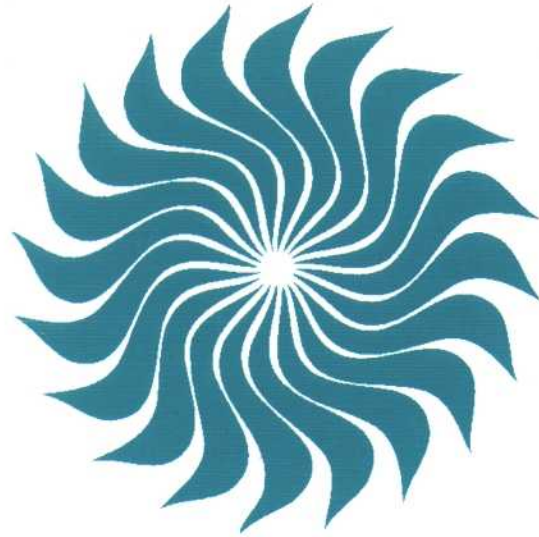


# JOINT EDUCATION TRUST



*Annual Review 2000*





# **JOINT EDUCATION TRUST**

## *Annual Review 2000*

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# MISSION AND STRATEGY

- To serve the development of the most disadvantaged groups in South African society.
  - To mobilise and co-ordinate resources between the public, private and civil sectors.
  - To improve the quality of education and the relationship between education and the world of work.
  - To contribute to the process of long-term fundamental change in the education and training system.
  - To show measurable results.
- 

## SERVICES

- Project Management
  - Financial Management and Fund-holding
  - Evaluation
  - Research
  - Workforce Advising
- 

## SECTORS

- School Reform
- Teacher Development
- Higher Education
- Further Education and Training
- Worker and Adult Education

## JET PARTNERS

- AFCT Limited
- Amplats Limited
- Anglo American Corporation Limited
- AngloGold Limited
- Barloworld Limited
- Billiton SA Limited
- C.G. Smith Limited
- De Beers Consolidated Mines Limited
- First National Bank of SA Limited
- Johannesburg Consolidated Investment Company Limited
- Johnnic Limited
- Reunert Limited
- Sanlam
- Sasol Limited
- Southern Life Association Limited
- Standard Bank Investment Corporation
- The South African Breweries Limited
- The African National Congress
- The Azanian Peoples Organisation
- The Congress of South African Trade Unions
- The Foundation for African Business and Consumer Services
- The Inkatha Freedom Party
- The National African Federated Chamber of Commerce
- The National Council of Trade Unions
- The Pan African Congress
- The South African Democratic Teachers Union

## BOARD OF TRUSTEES

- Mike Rosholt  
*(Chairman)*
- Naledi Pandor  
*(Vice Chair)*
- Naele Axelson
- Mahlengi Bengu
- Margie Keeton
- Andre Lamprecht
- Peter Mahlangu
- Jabu Maphalala
- Aubrey Matlola
- Sej Motau
- David Moshapalo
- Mogole Mphahlele
- Thenjiwe Mtintso
- Andrea Parkerson
- Jeremy Raetliffe
- Mabel Rantla
- Sam Seepei
- Leepile Taunyane
- Motlhalegi Thale

## SECRETARIAT

- Dr Nick Taylor  
*(Executive Director)*
  - Alan Ralphs  
*(Divisional Manager: Lifelong Learning)*
  - Kholofelo Sedibe  
*(Divisional Manager: School Development & Support)*
  - Hemant Waghmarae  
*(Divisional Manager: QEP)*
  - Jim Wotherspoon  
*(Divisional Manager: Finance & Administration)*
  - Michelle Buchler  
*(Project Manager)*
  - Thelma Dibakwane  
*(Administrator)*
  - Anthony Gwer  
*(Divisional Manager: Evaluation & Research)*
  - Rhona Hing  
*(Accountant: Projects)*
  - Hawa Hoosen  
*(HR/Office Manager)*
  - Tebogo Kibe  
*(Accounts Clerk)*
  - Elizabeth Koaho  
*(Accounts Clerk)*
  - Patrick Madima  
*(Accounts Supervisor)*
  - Gloria Mkhize  
*(Administrator)*
  - Debra Mogorosi  
*(Receptionist)*
  - Buyi Mxenge  
*(Records Clerk)*
  - Thobile Ngubo  
*(Accounts Supervisor)*
  - Phindi Sigodi  
*(Project Manager)*
  - Jabu Simelane  
*(Accounts Clerk)*
  - Amarlal Soma  
*(Accountant)*
  - Kathy Tracey  
*(Public Relations Manager)*
- RESIGNED DURING THE YEAR**
- Mashwahle Diphofa  
*(Deputy Director)*

## Farewell Mash Diphofa

Mashwahle Diphofa was amongst the first JET staff appointed in January 1993, along with executive director Chabani Manganyi, his deputy Nick Taylor and administrators Kathy Tracey and Deborah Lang. Mash played a prominent role in establishing the systems for proposal assessment and project monitoring which provided the solid foundation on which the reputation of the Trust was built.

By the time Mash was appointed general manager of the Projects Division in January 1996 he led a team of ten project staff responsible for overseeing nearly 400 grantees. In December 1997 Mash was promoted to the position of Deputy Director. In September 2000, after nearly eight years in the organisation, he left JET to take up a Chief Directorship in the Department of Public Service and Administration .

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*Working for JET offered one an opportunity to be part of a growing organisation which was trying to be responsive to the dynamic development imperatives of the country. What was even more exciting was the opportunity to interact meaningfully on these issues with different groups which brought a range of valuable considerations to bear on the development process. One interacted with beneficiary communities through the projects JET funded, with political organisations, business and organised labour through their representatives in the JET Board of Trustees, with a range of international donors and, at least after 1994, with government.*

*Mashwahle Diphofa  
2001*





**JET Secretariat**

*Standing - left to right: Debbie Mogorosi, Jabu Simelane, Thabiso Nyabanyaba, Hawa Hoosen, Jennifer Roberts, Patrick Madima, Leigh-Mae Julius, Thelma Dibakwane, Rhona Hing, Alan Ralphs, Thobile Ngubo, Buyi Mxenge, Kholofelo Sedibe, Kathy Tracey, Michelle Buchler, Gloria Mkhize. Seated - left to right: Tebogo Kibe, Jayce Pillay, Elizabeth Koaho, Amarlal Soma, Phindi Sigodi, Anthony Gewer. Inserts- left to right: Nick Taylor, Jim Wotherspoon, Hemant Waghmarae, Sindi Nyoka. Absent: Jo Lazarus*

## EMPLOYMENT EQUITY

In line with its mission of developing South Africa's most disadvantaged communities, JET applies the same principle to its own staff recruitment and development practices. An Employment Equity Team was established in 1998, under the leadership of Deputy Director Mash Diphofa. The Team undertook an audit of employment policies and practices in the organisation, drew up a staff profile and developed an Employment Equity Plan for the period 1999-2001.

Because of its size, JET was not required to submit its plan to government. Nevertheless, in order to demonstrate a strong commitment to equity, over and above the minimum requirements of the law, the plan was submitted to the Department of Labour in 2000.

The recommendations of the Plan included addressing some gaps in JET's HR policies, increasing the representation of women and black employees in the middle and senior management levels, strengthening the capacity and status of the HR portfolio, and increasing representation of middle management in the Executive Committee.

Significant progress has been made in all these areas, and we are confident that our goals will have been substantially met by the end of 2001. However, working toward employment equity is an ongoing process, guided by a continuous review of progress and refinement of targets.

# CHAIRMAN'S STATEMENT

South Africa has for the last seven years been experiencing fundamental transformation, a process which is by no means yet complete. Now that the Local Government elections are out of the way, political and constitutional change has been formally completed, while the macro economic strategies and policies necessary to allow the country's entry into the global economy are in place. However, it cannot yet be claimed that the socio-economic change and grassroot delivery so essential for future social and political stability, has been anywhere near adequate. That is not to say that policies have not been put in place, but that generally their implementation has lagged.

It is in this very important field of socio-economic development that non government organizations have in the past focussed their activities and efforts, and will continue to do so. They too have been affected by transformation. In the past effective NGO's have looked to raise their requirements almost entirely from the private sector or from trusts and international aid agencies. Fund raising is much more complex today. The private sector continues to be inundated with requests from NGO's, but is now also being approached by government at all levels to contribute to a wider range of major projects. As a consequence many NGO's now have to supplement a reducing traditional contribution base with fee income earned from services to development agencies both within and outside government.

In terms of their operational methods, many NGO's have also been affected by the changes of the last few years. Whereas in the past, having raised the necessary funds, they were left to carry out their activities and projects largely independently, today these are very often carried out in partnership with the public and private sectors. This is a very encouraging development as it ensures projects are in conformity with government policies and guidelines, that they are prioritized and focussed, and that the necessary overall capacity is in place.

The Joint Education Trust, since its launch in 1992 has been an important component of the non governmental sector. It was a far sighted intervention by the 14 companies concerned, which recognized that their own individual corporate social investments in education, although significant, could never of their own make an effective impact on the systemic weaknesses of the national education system. Theirs was to be a collective effort and their R500 million contribution in 1992 rands was substantial. Since then JET has built up a nationally recognized expertise in sectors of the education field, has directly supported the work of many NGO's and helped to build up their capacity, has indirectly benefited many underprivileged communities, and has throughout worked closely with government at all levels.

It has at the same time built up a managerial and financial control capacity which has been recognized by a variety of overseas aid agencies, foundations and trusts. This is borne out by the fact that over the past seven years JET has been charged with the management of educational initiatives to the value of well over R500 million, which represents a significant gearing of the original contribution by the 14 companies.

The original Joint Education Trust Deed stipulated that when the R500 million contributed by the corporate partners has finally been spent, the Trust comes to an end. 2001 will see this clause come into effect. Mindful of this, the Board of Trustees has for a number of years been exploring ways and means of ensuring that the staff and expertise built up by JET over the nine years of its life should continue to be available for the transformation and reorganization of South Africa's education system. It decided that the only solution was to ensure that the future running costs were completely covered by fee income. And so it is very pleasing to be able to report that this objective was achieved in the 2000 financial year and that indications are that this will be repeated in 2001 and indeed in 2002.



A handwritten signature in black ink, appearing to read 'A.M. Rosholt', written over a horizontal line.

A.M. ROSHOLT

# VICE CHAIR'S STATEMENT

The words of then President Mandela when he addressed the 1996 JET Annual Report meeting have proved in the intervening years to have been prophetic:

“We welcome the formation of the Joint Education Trust in 1992 as a move inspired by patriotism and vision... This dynamic partnership between government, business, NGOs and community organisations has facilitated a practical programme within a common vision for peace, prosperity and opportunity for all South Africans.”

The end of 2000 sees JET entering a new chapter in its history. 2001 will see the fulfilment of the brief for which the Trust was formed: the disbursal of R500 million donated by the private sector. However, it has long been apparent that the other activities of JET have secured it a prominent niche in the field of education development in South Africa, and the Trust has established two new companies to take over this work during the course of 2001.

Two considerations were paramount in guiding the formation of these non-profit companies: Their work should be framed by the same Mission which has served JET so well over the last nine years. They should be governed by a Board which reflects the same spectrum of perspectives, expertise and representativity exhibited by the current JET Board of Trustees.

I am please to note that Thandiwe January-McLean has accepted the position of Chair of the Board of Directors of JET Education Services and JET Education Management. Other non-executive Directors appointed to date are Mike Rosholt, Thenjiwe Mtintso, Margie Keeton and Aubrey Matlole – all current JET Trustees – and Sindi Zilwa and Brian Figaji. The present JET Executive will constitute the Executive Directors.

I am confident that these arrangements will ensure that JET continues to be accountable to the education and training priorities of the country, and to make a major contribution to serving the needs of our poorest communities.

*Naledi Pandor*

Naledi Pandor  
Chairperson: National Council of Provinces



*We  
remain an  
education trust  
committed to educational  
development and to the  
promotion of education  
transformation as the means for  
assuring the development of the  
most disadvantaged  
communities*

Naledi Pandor  
Annual Report 1999



# SCHOOL DEVELOPMENT AND SUPPORT

South Africa's schooling sector is undoubtedly in crisis. While expenditure on schooling as a percentage of the national budget is high by any standards, and while participation rates are close to saturation, levels of efficiency are low even for developing countries. The 2000 matriculation examination produced significant increases in the pass rate, and in both the total number of successful passes and exemptions. Nevertheless, the output of the schooling system, after 5 years of decline off an already low base, is well short of meeting current national needs, let alone providing the skills required for any sort of economic takeoff.

Yet there is no shortage of effort in the field of school reform. Beside government's own programmes in this area, it is estimated that something in the order of 20% of the nation's nearly 30 000 schools are involved in donor- and NGO-initiated development projects of one or other kind, with a total off-budget expenditure of around R200m annually.

With few exceptions the effects of these efforts have been hard to discern to date. To a very considerable extent this apparent lack of impact is due to the enormously complex nature of schooling, and the consequent difficulties involved in bringing about the alignment of the diverse elements required to make a difference, to say nothing of the long haul needed before any significant changes at the institutional level begin to manifest themselves in improved outcomes.

Under the influence of a growing culture of accountability in the education domain, and increasing government capacity, a new generation of school reform programmes is emerging. The starting point for this approach is that programme priorities should be determined by government needs, and that the

success of any school reform initiative is a direct function of the extent to which it is owned and driven by the clients. The key interlocutors in this regard include senior officials in the national and provincial departments, and district and school managers.

A second principal assumption on which these initiatives are based is that, while qualitative changes in teaching and learning can only be effected by working directly with teachers at the classroom level, any such changes are not sustainable without intervention in the management practices of the school, nor are they replicable if capacity is not built at the district and higher levels of the bureaucracy.

The third assumption characterising these programmes is that impact oriented, longitudinal evaluation studies, based on an agreed set of outcome measures, not only have a profound formative effect on all the participants, but they also offer the only effective measure of success of such initiatives.

JET remains at the forefront of these developments through:

- a direct management role in five of the largest school development programmes in the country
- research into effective models of school reform
- programme evaluation

## Mahlahle

Mahlahle is a four-year district and school development project of the Northern Province Department of Education, in partnership with JET. It is implemented in the Giyani and Phalaborwa Districts of the North Eastern Region. The project works with 50 primary and 36 secondary schools. The total budget is

R29,5 million, of which the JET Board has committed R13,5 million to date.

Mahlahle remains one of the few projects which commenced with a full baseline study, which was instrumental in shaping the interventions at district, school and classroom levels. The main findings are summarised below.

- At the *Regional and District level*, the study found that the ratio of professional to administrative staff is 1 to 6,7. This imbalance results in each of the professional staff having to service an unmanageably large number of schools. In addition, only 33% of professional staff consider themselves qualified to fulfil their duties, and many of the remainder say they are unable to because of lack of transport and other resources.
- At the *level of the school*, 71% of school management teams stated that their most important role is to maintain discipline and only 9,5% viewed curriculum support as an important function of the SMT. Although all schools reported having a School Governing Body that complies with the South African Schools Act, in terms of

composition, structure and functions, only 12% of the SGB members listed financial management as a key responsibility. In addition, in the majority of schools, the learning atmosphere, and safety and security were found to be poor or very poor.

- The findings were rather disturbing at the *level of the classroom*. They suggest that curriculum planning, management and implementation is very weak in many schools. Only 13% of schools visited have a homework and assessment policy. And in 74% of the schools, learning and teaching materials are not stored in any systematic way.
- *Tests conducted to assess literacy and numeracy proficiency* revealed very low levels of pupil performance. The studies indicate that at the start of Grade 4 children are already a good two years behind their counterparts in developed countries. Most pupils are barely able to write their names and are only just beginning to learn to read. While the majority are able to complete word recognition tasks, there are dramatic declines in performance on sentence completion tasks, and uniformly very low results across schools on the



Learners in a Mahlale school completing JET's Grade 6 Learner Assessment tests

comprehension of simple passages. In the area of numeracy, it is striking that counting and ordering tasks were less well done than addition. This would seem to indicate that learners have low levels of conceptual understanding of the number system. The only numeracy skill which most children at this level are competent in is in adding two-digit numbers (ie tens), but only when no 'carrying over' of digits between the units and tens columns is involved.

Services are being provided to the districts and schools through two NGO consortia:

- The PROMAT Consortium, comprising of PROMAT, Itireleng Educational Project, Ngoepe Business Services and Renuka Ramroop, supports implementation in the areas of management, administration and governance; and
- The PROTEC Consortium, which consists of PROTEC, COUNT, The Molteno Project, Palabora Foundation and Akanani Rural Development Association, focuses on curriculum support in Maths, Science and Language.

### Imbewu

This R85 million project, funded by the British Department for International development (DFID) and managed by a joint venture led by JET, completed its three-year term in October 2000. It received two further 3-month extensions in order to wind down activities and

gear up for a new programme due to commence in 2001. The project provided support to four levels of the Eastern Cape Department of Education: provincial, district, school and classroom, working directly with 523 primary schools in 22 districts.



The launch of Mahlahle: MEC Edgar Mashwane with John Mabasa, who designed the Project logo

A prominent component of the project was an external evaluation conducted at the baseline, mid-term and final stages. The mid-term report noted a number of significant positive effects of the project:

- At the level of *school management* there has been a notable increase in the use of management systems, particularly in the area of financial management; the delegation of responsibility by the principal to other members of staff; support to the principal by SGBs; and co-operation within Imbewu schools between school management, teachers and pupils.
- At the level of *classroom practice* it is noticeable that teachers are using a greater variety of methods such as groupwork, applied activities, and questions to pupils; displaying pupil work more frequently; producing formal lesson plans and overall plans by week and term more often; and reporting greater levels of pupil interest and involvement.
- At the level of *community involvement* principals report greater awareness on the part of parents of policy changes.

- In the area of *learner performance* the results are encouraging. It is not anticipated that a project of this nature will effect significant changes in learner performance over the 12-month period between the baseline and mid-term studies. Nevertheless, with a few exceptions, the pupil data indicates that the overall performance of learners at different grade levels has increased.

These are remarkable results after only two years of operation, and the results of the final evaluation, which will be available in April 2001, are eagerly awaited.

In the meantime, after intensive discussions with the Eastern Cape and national governments, DFID has approved a new grant to the value of R242 million over a five-year period.

### Quality Learning Project (QLP)

The QLP is the first school reform initiative in South Africa that takes as its primary focus the improvement of learning outcomes. Specifically, it aims to raise the performance of students in Grades 8-12 in 500 high schools by at least 10% in mathematics, and reading and writing across the curriculum. The intention is to achieve this aim through:

- A district development programme directed towards improving management practices in 18 districts spread across all 9 provinces, and improving the support which district personnel provide to their schools
- A school development programme aimed at improving the management and governance of project schools
- A teacher development programme focused on improving the quality of teaching and learning
- A monitoring and evaluation component which will identify needs in districts, schools and classrooms, provide regular feedback to participants, and track progress towards achieving the project goals.



*QLP launch: Minister Kadar Asmal with Western Cape MEC for Education, Helen Zille and in the background, Brian O'Connell Director-General, Western Cape DoE*

The QLP is a five-year project funded by the Business Trust, with a total budget of R139 million. The national Department of Education guides its design and implementation. It is managed by JET, assisted by the National Business Initiative.

### District Development and Support Programme

The DDSP is funded by USAID and works in 459 primary schools in four provinces: Eastern Cape, KwaZulu-Natal, Northern Province and Northern Cape. It is a five-year programme which commenced in 1998. JET is part of the management consortium led by a US-based firm, Research Triangle International. JET's responsibilities include the provision of two grants managers to the project office, for the administration of the grants to service providers, management advice, research and other technical support.

Most recently JET was commissioned by the DDSP to administer the literacy and numeracy assessment instruments developed for the Mahlahle project to 40 grade 3 learners in each of the DDSP schools. This work is described in more detail in the ERD Divisional Report.

### **Siyathuthuka**

This is a school development project being implemented by the KwaZulu-Natal Department of Education and Culture in the Vryheid Region, in partnership with the Royal Netherlands Embassy and several NGOs. The project provides support in management and governance at school and district levels, community development, and curriculum support in mathematics, science and language at the grade 4-7 levels.

The project is in the third year of operation. In August 2000, the Royal Netherlands Embassy requested JET to take responsibility for financial management and overall programme management support for the remaining eighteen months.

It was decided that in 2001, the project would work with 75 primary schools spread across 4 districts and 15 circuits in the Vryheid Region. 75 additional primary schools will be phased-in during 2002.

An initial grant of R8 million was approved to support implementation between August 2000 and March 2002. It is expected that a decision regarding the extension of the project for an additional two years will be finalised before the end of 2001.

### **Co-operation In Education Between Netherlands and South Africa (CENESA)**

CENESA is a technical support project between South Africa and the Netherlands. It will provide assistance to the national Department of Education, and the provincial

departments of KwaZulu-Natal, North West and Northern Province. The focus areas of support are General Education and Training, with the emphasis on curriculum development and assessment, management development, teacher education and quality assurance; and Further Education and Training, with a focus on programmes that support the recognition of prior learning, and the development of learnerships.

Approximately R4.8m will be made available every year, over a period of five years. An additional R1,5m was allocated by the Netherlands Ministry for FET support in 2001. The project is managed jointly by JET and the Dutch NGO NUFFIC.

During 2000 two projects were approved under this programme:

- Support in the field of curriculum development and management by the Dutch organisations SLO and CITO
- The development of learnership pilot programmes to selected technical colleges. The Dutch partner on this project is SINOP

### **Learners with Special Educational Needs**

The purpose of this project, funded by DANIDA, is to contribute towards building an inclusive education and training system in South Africa. It is being piloted in three Provinces, Eastern Cape, North West and KwaZulu-Natal. The budget is R13m over two years.

The LSEN project is implemented with the support of three consortia, led by Wits University in the case of the North West, Fort Hare's School of Government in the Eastern Cape, and Natal University in KwaZulu-Natal.

### **Grant-Making**

Just over R4,1 million was disbursed to 20 projects in 2000, bringing the total amount disbursed in this sector to almost R103,3 million since 1992.

# RESEARCH AND EVALUATION

The primary purpose of the Division is to develop and apply evaluation and research techniques aimed at uncovering evidence of factors that promote or inhibit significant and sustainable educational change.

To date, the range of studies undertaken by the Division has mainly been directed towards providing insights into the challenges facing transformation of public education – in classrooms, schools, technical colleges, districts, universities and Provincial Departments of Education. During 2001 we will be extending this work to the workplace and focusing on the challenges facing the implementation of the Department of Labour's strategy around skills development and job creation.

## Researching models of school development

JET has either managed or commissioned multi-level evaluation exercises of all the school reform programmes managed by our School Development and Support Division. These studies are underpinned by a fundamental belief that the health of the schooling system, or any part of it, is ultimately measured through an adequate understanding of how learners are benefiting. A key element of these evaluations, therefore, is an assessment of learner performance. These outcomes are then correlated with classroom observations of teaching and learning practices, and an analysis of management systems, in order to ascertain which factors make a difference in improving the quality of schooling.

*The Division has a commitment to the development of sophisticated research designs that have as their basis the collection of empirical evidence that demonstrates sustainable impact.*

*In this way, the Division seeks to support the development of a high quality research and evaluation culture that instils public accountability and ethical practice, to ensure that investments in education and training realise measurable returns.*

Evaluations of this kind include major studies on Imbewu, Mahlahle, the Quality Learning Project, the District Development and Support Project, and the Cadbury-Schweppes School Development Initiative. The findings of this research have and will continue to inform projects within JET, and will provide a basis for future research and evaluation work in the schooling system.

In addition to these project specific evaluations, the Division is undertaking an overview analysis of the sector through the Research on School Development (RSD) Project.

Initiated and funded by JET, with additional support from the DG Murray Trust and the Anglo-American Chairman's Fund, its primary focus is to understand the approaches which have been utilised in attempts to improve schools in South Africa. The research aims to describe current approaches and to map the current state of school development in South Africa against international trends in school reform. The rapid growth occurring in the area of school development over the last five years, has resulted in a fragmentation of effort, with individual projects pursuing their own designs and not having time to take stock and share information. Consequently, each project is having to invent solutions to problems which are common to the field as a whole. Under these circumstances there is an important need to promote a climate of common endeavour and information sharing in getting to grips with the enormous problem of school malfunction in South Africa, without doubt one of the greatest difficulties facing the country at the present time.

This project undertook two key activities during 2000:

- Case studies of school development projects. 11 school development projects agreed to participate in the study.
- Development of a database of school development projects aimed at promoting contact between projects and increased sharing of ideas and lessons about how schools can be improved.

The project will culminate in September 2001 with the release of the final report at a conference on school development.

### **Systemic Assessment Instruments for Learners (SAIL)**

Over the last few years, educational discourse has shifted to focus on learning outcomes and learner performance as an important diagnostic tool and as a means for promoting the accountability of the education system. Although greater attention is being given to matters related to learner performance, there is limited expertise in South Africa in the area of learner assessment and how it might be used to improve the education system

The purpose of the SAIL project is to develop standardised instruments that assess foundation competencies in literacy and numeracy at different grade levels. The initial test focused particularly on the acquisition of knowledge and skills in the Foundation Phase. These instruments will provide for:

- The collection of diagnostic information on learner progress
- An informed basis for systemic and programme interventions aimed at improving the quality of education
- Accurate and objective information on project impact

The literacy and numeracy instruments for Grade 3 were developed in close consultation with national and provincial departmental officials and teachers, in order to link them to a grounded understanding of what pupils should

be able to do at this level. The Dutch national institutes for curriculum and assessment, respectively (SLO and CITO), assisted in benchmarking the items to international standards. The instruments were piloted with a range of South African pupils to ensure that they discriminated across the spectrum.

Initially developed for use in JET's Mahlahle project, they have subsequently been translated into 7 languages and administered in well over 1000 schools in 5 provinces. These results are beginning to produce a comprehensive and detailed picture of the state of learning in the Foundation Phase.

The Division is currently working on a parallel set of instruments for assessing literacy and numeracy at the Grade 6 level.

### **Research Training Programme**

The high level skills required to undertake the kinds of evaluations described above, and to develop and analyse the results obtained from diagnostic tools like the SAIL instruments are very scarce in South Africa. In order to meet this need JET will launch an advanced training programme in education research methods, in partnership with the universities of Cape Town and Stellenbosch, in 2001.

The purpose of the programme will be to upgrade the skills of JET staff, to increase the pool of competent researchers in the country, and to promote the importance of high quality research. The first cohort of students will include government officials and university staff, both at the host institutions and from disadvantaged campuses. Leading international researchers will be combined with the best local expertise in presenting the course.

### **Incorporation of Colleges of Education into Higher Education**

Following the recommendations of the National Commission on Higher Education

and the subsequent Higher Education Act of 1997, the Minister of Education declared his intentions during 2000 to achieve the incorporation of colleges into higher education institutions in all nine provinces. JET was awarded the tender to facilitate this process in July 2000. This task is being funded by US AID, through the Tertiary Education Linkages Project, and the Education Labour Relations Council's Employer's Fund.

JET has been contracted by the Department of Education to:

- facilitate the incorporation of teacher education colleges into higher education institutions
- assist in the development of a national plan for teacher education.

Work on this project began in September 2000 and will continue until mid 2001.

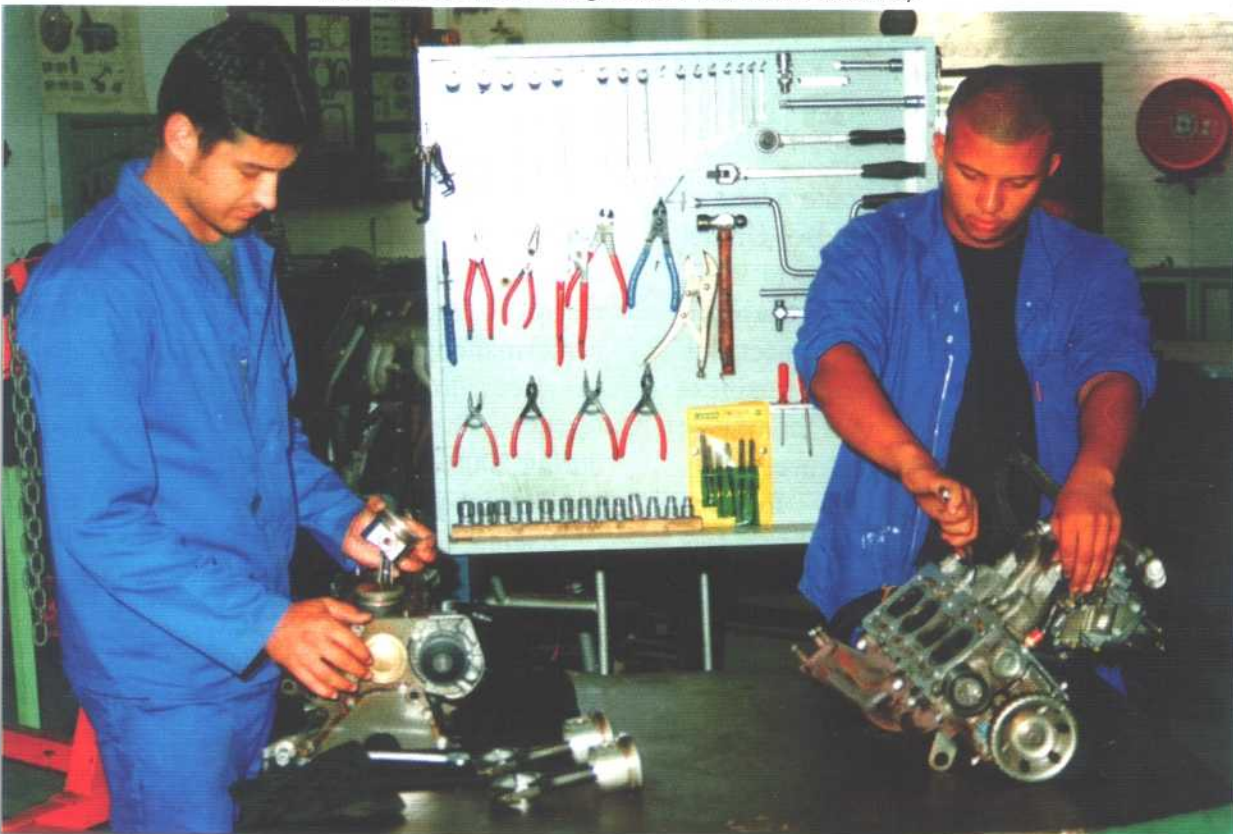
### Colleges Collaboration Fund

The Colleges Collaboration Fund (CCF) is a five-year R100-million Business Trust project,

being managed by the National Business Initiative and aimed at supporting the Department of Education with the transformation of technical colleges. The FET college sector has the potential to provide education and training to a range of learners and make a significant contribution to alleviating the skills shortage in South Africa. The CCF seeks to contribute to the building of the FET sector by developing colleges into efficiently managed institutions that respond to the needs of FET learners, employers and the community. This will be done through a package of programmes designed to strengthen the organisation and capacity of the FET college sector and to encourage meaningful transformation in these institutions and in the Department of Education, in line with current FET policy and legislation.

JET has been commissioned to undertake an evaluation of the project. The evaluation has been designed as a formative exercise to assist the project to continuously reflect on the impact of the CCF, so as to inform the ongoing developments of the project and ensure the project is achieving its objectives. During

*Western Province College: Motor Mechanics workshop*



*Picture: Courtesy of Colleges Collaboration Fund Project*





*Protea College: Food Production*

2000, the focus was on the establishment of a baseline derived from a sample of colleges, against a set of key indicators. Over the next three and a half years, this evaluation will track the impact of the CCF in this sample of colleges, through intensive case studies, as well as working directly with the National and Provincial Departments of Education to monitor how the CCF is responding to their needs.

### **Africare**

JET was contracted by Africare South Africa to conduct an impact evaluation of the Digital Villages Project. Initiated by Africare in 1997, in collaboration with donors such as Microsoft, Intel and Kodak, the purpose of the project is to make educational, cultural and business resources available through the 'computer technology superhighway' in an accessible, affordable and sustainable way for the development of disadvantaged communities throughout South Africa. At the time of the evaluation, Africare had established four functional Digital Villages, located in township environments and aimed at providing training in and access to the use of Microsoft software and internet technology. The Digital Villages act as resource centres for adults and young

learners and aim to develop skills for job creation. Africare requested ERD to conduct an impact evaluation in order to inform the sustainability of the project and the potential roll-out of future centres.

### **Early Reading Strategy**

The Early Reading Strategy is a project implemented in collaboration with the Gauteng Department of Education (Benoni/ Brakpan District) which aims to improve the acquisition of literacy skills by Foundation Phase learners. The project is jointly funded by JET and the Gauteng Department of Education, and encompasses various activities including: research and the assessment of learner performance; the provision of material resources to schools; and the training of teachers. The following tasks were completed during 2000:

- District-wide assessment of Grade 3 reading competence
- Phase one of the research into reading and literacy skills in children,
- A first report, titled "Managing education change in South Africa"
- Curriculum framework development, with a set of performance indicators for phonics, reading and writing.

# LIFELONG LEARNING

The activities and achievements of this Division in the year 2000 fall into two distinct but related tracks: Youth Development and Learnerships, and RPL and Workforce Development.

## YOUTH DEVELOPMENT AND LEARNERSHIPS

The scope and scale of youth unemployment and poverty continues to present one of the most difficult challenges facing our new democracy as we move into the 21st century. Numerous attempts have been made by government and civil society organisations to promote a more coherent and effective strategy for addressing these challenges at the national, provincial and local levels. Most of the successes, some of them funded by JET in the 90's, have been implemented by NGO's in local communities, but by and large their impact has been small in the face of a very sizeable problem. However, the introduction of

recent government policy and legislation, notably the Further Education and Training Act (1998) and the Skills Development Act (1998) hold great promise for the implementation of large-scale systemic interventions.

It is within this context that JET's Division for Lifelong Learning resolved to concentrate on projects that would support systemic change and help to maximise government and civil society partnerships in meeting the challenges faced by the youth sector. The opportunity for such a focus appeared most evident in the call for new learnership programmes that could support a more strategic focus on economic development and job creation through Small, Medium and Micro Enterprise organisations. The introduction of a Skills Levy and the National Skills Fund have begun to generate the resources with which to ensure the sustainable development and delivery of these new programmes, although it remains a question as to when and under what conditions these funds will be released.

### ***The validation team:***

*Building new partnerships for a Learnership Project in the Eastern Free State*



## Grant Making to NGO's

Following a decision of the Board in May 1999, the scope and scale of JET's grant-making activities under the Youth Development Portfolio changed substantially. The focus shifted to learnerships and to assisting organisations negotiate the changes required by the new system. Fourteen organisations met these criteria and grant funding in the amount of R4,1m was approved at subsequent Board meetings over the period from September 1999 to August 2000. The beneficiary organisations ranged from those offering short courses with a focus in agriculture, construction, office administration, catering, frail care, computer literacy, and small business development, to those which offer more formal programmes.

## Lead Project: Learnerships for Unemployed Youth

Early in 2000, the Division commenced a feasibility study, funded by the JET Board, for a learnership pilot project for unemployed youth in the eastern Free State. The purpose of this investigation was to identify the best possible sectors and sites within which to locate the development and delivery of a two-year learnership pilot project. The study was overseen by a consortium made up of representatives from government and civil society, including the Department of Labour, the Department of Education and the Micro Enterprise Alliance. The services of a local NGO, Education with Enterprise Trust (EWET), were recruited to gather information, and the findings validated by a specialist team of education and SMME experts. The feasibility study was conducted in the Harrismith/Phuthaditjaba area and found inter alia that:

- While there was a decline in formal employment opportunities in the regional economy, employment in the informal sector had increased from 6% to 21% over the period from 1985 to 1995.
- There is substantial support for the

development of the SMME sector in the region from the more established and emerging business. A poll of 28 businesses indicated that they could make available 84 workplace opportunities for learnerships.

- Local businesses in the Accounting, IT and Retail sectors see this initiative as part of a bigger social and economic investment in the development of the region.
- There is a vibrant although unevenly resourced set of FET institutions in the region with the facilities and staff to offer programmes in Accounting, IT, and Small Business Development Skills.

Based on these findings the team began work on a project proposal to provide learning opportunities for up to 1000 young people, inclusive of a comprehensive skills development programme, which would open a pathway to fully-fledged learnerships, incorporating extensive workplace-based experience for learners. The current focus of the proposal is to offer a selection of courses relevant to registered qualifications in the following sectors: Wholesale and Retail, Information Technology, Finance and Accounting.

In November 2000 the JET Board resolved to consider further funding and support for the project on condition that full government



Yvonne Pelle and Gordon Greer participate in a Planning meeting for the Learnership Project.

commitment and co-funding was secured. This is dependent on a number of financial and other considerations related to the promulgation of Learnership regulations and strategic plans for FET development in the Eastern Free State. These are expected to be finalised early in 2001 and our hope is that the project will be able to secure sufficient support to be fully operational in 2002.

## RPL AND WORKFORCE DEVELOPMENT

The introduction of the principles and practices of RPL (the Recognition of Prior Learning) in South Africa dates back to the 1980's when representatives of organised labour sought the recognition of workplace based training and experiential learning for purposes of job grading and access to further education and training. More recently RPL entered the agenda for transformation of the education system in SA when it was adopted as a founding principle of the National Qualifications Framework (NQF).

In 1995 the **Workers Higher Education Project (WHEP)** was started at JET, with funding grants from the Ford Foundation and the W.K. Kellogg Foundation, and in partnership with the Chicago-based Council for Adult and Experiential Learning, which has extensive experience in RPL and Workforce Development in the US. Over the last 5 years JET has done much to inspire, initiate and fund new RPL related projects in the fields of management and leadership training, teacher education, primary health care nursing, agriculture and rural community development. These include a variety of research and development activities relevant to the exploration and introduction of RPL programmes and services in Higher Education and in the workplace. The following institutions and organisations were supported through the WHEP programme in 2000:

- Technikon SA and University of Venda in the project based at the Sapekoe Tea Estate in the Northern Province

- The Johannesburg College of Education and Wits University on the teacher education RPL project
- The University of the Free State on the Business Management Leadership project
- The University of Natal, Pietermaritzburg Campus, on the Participatory Development Certificate in Education project
- The Peninsula Technikon and University of Transkei on the Primary Health Care Nursing Diploma project

In total, approximately 135 learners have gained access to higher education through these programmes since the beginning of 1999. Of these, 112 are registered at the University of the Free State through four intakes of learners for the Bachelor in Management Leadership which has moved beyond pilot status and is now a subsidy-funded programme. Approximately another 80 learners are due to go through an RPL assessment process, between November 2000 and January 2001, in pilot projects located at Peninsula Technikon, University of Natal (Pietermaritzburg) and the Sapekoe project hosted jointly by Technikon South Africa and University of Venda.

Furthermore, as a result of the lessons learned through the WHEP pilot projects, a number of institutions have significantly altered their admissions policies. Peninsula Technikon, Technikon SA and the University of the Free State have formal policies and procedures in place. JCE and WITS have established forums to further develop formal institutional policies. In addition, the UFS has successfully had its Portfolio Development Course validated by and registered with the Matriculation Board as an alternative to the admissions rule stipulating matriculation with university exemption. The School of Education at Wits University has changed one of the rules relating to alternative admissions requirements for its BEd degrees, which now allow for under-certified, but experienced teachers to gain access upon successful completion of a portfolio.

The WHEP Pilot Projects have also made significant advances in developing new

assessment tools. Univen and TSA have, with technical assistance from CAEL, undertaken a validation exercise of the Sapekoe in-house training courses. Some courses have been evaluated and recommendations for their creditworthiness within the Certificate in Tea Production and Management are being developed. All courses in the pilot projects have either been newly designed, or have been revised, in order to accommodate learners' prior experiences and fields of expertise.

In all these areas WHEP continues to advance our knowledge in the development of alternative, cost-effective models for expanding opportunities for adult learners in further and higher education.

### Workforce Advising and Support Services

The challenge of education and training for the majority of the South African workforce is crucial to the deepening of democracy and to the development of a new economic order in South Africa. Over the last few years the government has put in place the necessary policy and legislation to support the escalation of skills development programmes for the

employed and unemployed members of the SA workforce. This has created substantial incentives for unions, employers and training providers to support the provision of new learning opportunities that are responsive to the strategic priorities of the workplace, small business development and poverty alleviation.

It is within this context that the JET Board initiated the development of a Workforce Advice and Support Service model aimed at delivering a comprehensive set of services and programmes to retrenched and employed workers. This initiative is a product of the relationships built between JET, the Ford Foundation and CAEL.

The project commenced with a feasibility study to determine the most suitable sectors, location/s, institutions and systems for introducing a sustainable workforce development programme to an estimated 1000 retrenched workers over a two year period. The study was carried out with technical assistance from selected research agencies at sites in Newcastle, Pretoria and Port Elizabeth, and involved the Department of Labour (Employment Services), the Mineworkers Development Agency (MDA), the National Union for Metalworkers of South Africa



Ivan Chabalala, IR Representative for Ford Motor Company in Southern Africa, "Setting the tone" at the launch of Workforce Advising and Support Services pilot project.

(NUMSA), and the National Union of Mineworkers (NUM).

Based on the positive findings of the feasibility study, a project plan and budget have been developed and submitted to the Boards of the Ford Foundation, the Workers Security Fund, and the JET Board. The JET Board has agreed in principle to fund the project pending the decisions of the Workers Security Fund and the Ford Foundation.

The purpose of this project is to provide an holistic programme of advising and training services to 1000 retrenched workers at selected locations in South Africa. Advising and counselling services and programmes relevant to the needs of adult workers will commence with JET's three day Dipaakanyo programme, a "Returning to Learning" Course, and the Department of Labour's Recovery and Self-discovery workshops. After the workshops, further counselling and support, on an average of three hours per participant, will also be provided. This will assist participants in refining and implementing their personal development plans.

Education and Training providers will be contracted to customise courses and delivery systems to meet the requirements of the adult learners. This will include provision for staff development and training on assessment and recognition of prior formal and experiential learning, portfolio development and curriculum development. These institutions will be contracted to deliver relevant qualifications in ABET, FET Colleges and



Meshack Masuku receives the Sol Plaatje Annual Learners Award from Naledi Pandor at the RPL Conference in October 2000. Meshack, who left school at the end of Std. 2, now holds a B.Tech (Ceramic Design) and is a lecturer at P.E. Technikon.

Higher Education; or more focussed enterprise development courses, chosen by the workers.

A computerised accounting and information system will also be developed to harness and manage dedicated education and training funds for the adult learners.

### Advocacy and Research

The year 2000 has been decisive in taking the lessons of the WHEP projects into a more public arena. This was made possible through two nationally co-ordinated research projects and the RPL Conference held in October.

The first of the research projects looked at emerging RPL policy models at publicly funded Higher Education Institutions in SA. The second project focused on the articulation of quality models and guidelines for the design of adult learning programmes in Higher Education. Both of these projects were presented at the RPL Training and Policy Conference which brought together some 160 people from all spheres of RPL policy and practice in South Africa and internationally. The conference, which was well supported by most of the key policy makers and RPL practitioners in South Africa, created the opportunity for a public review of current RPL challenges facing adult learners in the workplace and in the institutions of Further and Higher Education and Training. The presentations at the conference included the projects funded and supported by the WHEP team at JET, as well as the findings of the two national studies undertaken by JET.

# COMMUNITY-HIGHER EDUCATION SERVICE PARTNERSHIPS (CHESP)

The aim of the CHESP Project is to develop and research pilot academic programmes which will give expression to the mandate of the White Paper on Higher Education (1997) regarding partnerships between communities, higher education institutions, and service providers. The goals of these pilot programmes are to:

- contribute towards the empowerment and development of local communities
- make higher education policy and practice more relevant to community needs
- enhance service delivery to participating communities.

The project is funded by the Ford Foundation, the JET Board and the Kellogg Foundation.

In April 1999 JET approved a Planning Grant to eight HEIs to develop institution-wide policies and strategies for community engagement through mainstream academic programmes. Each grant was linked to 6 specific outcomes:

## 1. Identifying Partners

All participating HEI's identified at least one community and one service sector partner. Generally, community partners were defined as a specific geographic community. Service sector partners included NGO's; chambers of commerce and industry; private sector corporations; and local, metropolitan and provincial authorities.

## 2. Formation of Partnership Structures

At each participating HEI, the CHESP planning process was facilitated by a CHESP core group, consisting of at least one

community member, one academic, and one service sector representative nominated by the university in consultation with its community and service sector partners. In order to build the capacity of these teams, JET, in collaboration with the Leadership Center of the University of Natal, developed a graduate programme in Leadership Capacity Building. Nine of the twelve modules in the programme were completed by December 2000. Each module was designed to inform the planning and development process in participating communities, HEI's and service sector agencies.

## 3. Community Situation Analysis

In contrast to the more usual deficit-based approach, CHESP adopted an asset-based approach to the situation analysis, focusing on the identification of assets within each community which could be used to further the aims of the CHESP. Typical assets included: schools; clinics; businesses; churches; community associations; NGO's; recreation and sport facilities; skills and capacities within the community; and, in rural settings, physical resources such as rivers; dams; springs; reservoirs; and boreholes. Development priorities included local economic development; development of community infrastructure; capacity building and skills training; development of recreational facilities; health services; crime prevention; tourism; and conservation of the natural resources.

## 4. HEI Audit of Community Service

In order to match community assets and development priorities with HEI initiatives, all participating HEI's conducted an audit of their existing community service activities. The



Emzameni High School in Pietermaritzburg being used as a service-learning site by the University of Natal. From left to right: Nhlanhla Ngubane Dep. School Principal, Prof. Dilafruz Williams (Portland State University), Prof. Tim Nuttall (University of Natal) and Prof. Sherril Gelmon (Portland State University)

## 5. Institution-wide Policy on Community Engagement

Most participating HEIs developed policies for engaging mainstream academic programmes more formally and actively in the development of neighbouring communities.

Specific elements of these policies include:

- Defining various forms of community engagement.
- Benefits for the HEI flowing from

audit revealed that all HEI's are engaged in a wide range of community service initiatives.

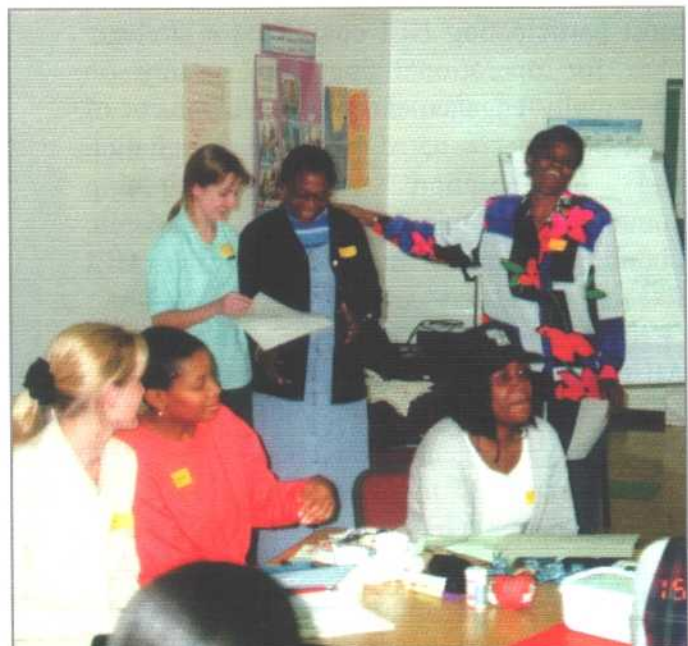
Key benefits of community-based learning identified in the audits include:

- Increased relevance of course material to real-world community issues.
- Engaging with community issues facilitates interdisciplinary learning.
- Enhancing the HEI's relationship with neighbouring communities.
- Opening up new opportunities for research based on community issues.
- Enhancing student understanding and learning of course material.

Key obstacles to community-based learning identified in the audits include:

- Setting up community-based learning can be time consuming.
- Community-based learning requires additional resources not catered for in the current higher education funding formula.
- Community engagement is not adequately recognized in the current reward system for academic staff (i.e. tenure and promotion).

- community engagement.
- Principles and strategies for community engagement.
- Models for organizing and implementing community engagement.
- The allocation of resources towards community engagement initiatives.
- Recognition of community engagement in academic staff promotion.



Occupational Therapy, Social Work and Speech and Hearing students facilitate a workshop with the Hillbrow Womens' Support Group on creating toys from waste.





**Meeting with HE stakeholders including Vice Chancellors of HEI, SAUVCA, DoE and CHE, Clockwise:**

*Nick Taylor (JET), Njabulo Ndebele (UCT), Brenda Gourley (UN), Piyushi Kotecha (SAUVCA) Leila Patel (Wits), Prof. Colin Bundy (Wits), Saleem Badat (CHE), Stef Coetzee (UOFS), Ira Harkavy (UPenn), T Erasmus (UP), Ahmed Bawa (UN), Tim Stanton (Stanford University)*



**The signing of a service-learning agreement between the University of Pennsylvania and Wits. From left to right: Frank Johnston (UPenn), Ira Harkavy (UPenn), Colin Bundy (Wits) and Leila Patel (Wits)**

## 6. Strategic Plan for Community Engagement

Building on the outcomes mentioned above, most participating HEI completed a strategic plan for operationalising their policy on community engagement. The development of these plans necessitated extensive consultation and collaboration with participating community leaders, academics, academic planning officers, members of the HEI Executive, and service sector representatives.

All strategic plans were approved by the HEI Executive as an institution-wide strategy for community engagement. The plans also served as a proposal to JET for a CHESP Implementation Grant. Resulting from these plans, JET will be supporting the development and research of approximately fifty pilot community-based academic service-learning programmes across a wide range of disciplines during 2001.

## National Policy Initiatives

JET has been working closely with various higher education stakeholders including the CHE, DoE, SAQA, and SAUVCA on national policy initiatives. Specific activities included the drafting of a Discussion Document on Community Service in Higher Education for SAQA, contributing to CHE documentation on community service in higher education, and assisting the DoE to develop policy on community service in higher education.



**Some of the delegates who attended the meeting, from left to right, back row:**

*Nick Taylor (JET), Makhukhu Mampuru (DoE)  
Front row: Susan Stroud (Ford Foundation), Njabulo Ndebele (UCT), Naledi Pandor (JET Board), Saleem Badat (CHE), Ira Harkavy (UPenn), Liz Hollander (Campus Compact: USA), Tim Stanton (Stanford University) and Nazeema Mohamed (DoE)*

# FINANCE AND ADMINISTRATION

The focus of the Division during the year 2000 was geared to the preparation of Business plans for the period 2000/2002 to ensure a successful transition to the new JET with financial self-sustainability.

Two section 21 companies were registered to continue with JET's goals of:

- Improving the quality of schooling and systems through which schools are supported and managed;
- Providing entrepreneurial education and training for young people and adults;
- Improving the knowledge and skills of working adults through systemic schooling, instruction and training.

Ancillary activities will encompass:

- Project Management
- Project planning and facilitation
- Evaluation
- Research
- Advocacy and networking
- Fund management
- Management of grants, planning and management of projects, evaluation and research, advocacy and networking
- Investigations at schools and other learning sites to establish which delivery models work best and under what conditions
- Performing project management, project planning and facilitation, evaluation, research in respect of educational projects

## EXTERNAL PROJECTS AND FUNDS ADMINISTERED

### IMBEWU

funded by DFID ( Department For International Development).....£7.5 million  
(R85 million)

### WORKERS HIGHER EDUCATION PROJECT(WHEP)

funded by the Ford Foundation and Kellogg Foundation.....\$1.6 million  
(R12 million)

### COMMUNITY HIGHER EDUCATION SERVICE PARTNERSHIP

funded by the Ford Foundation.....\$2.2 million  
(R16 million)

### DISTRICT DEVELOPMENT SUPPORT PROGRAMME

funded by USAID (United States Agency for International Development).....\$20 million  
(R150 million)

### LEARNING SUPPORT MATERIALS SUPPLY PROGRAMME

funded by the Royal Netherlands Embassy, Pretoria.....R18 million

### SIYATHUTHUKA PROJECT

funded by the Royal Netherlands Embassy, Pretoria.....R10 million

### SUB SECTORAL SUPPORT FOR FET POLICY

funded by the Royal Netherlands Embassy, Pretoria.....R1,5 million

### COLLEGE COLLABORATION FUND

Funded by the Business Trust.....R100 million

### QUALITY LEARNING PROGRAMME

funded by the Business Trust.....R139 million

### DEVELOPMENT COOPERATION IN BUILDING INCLUSIVE EDUCATION

funded by the Danish International Development Agency (DANIDA).....R13 million

### TEACHER EDUCATION PROJECT

funded by the USAID (United States Agency for International Aid).....R3 million

These companies, JET Education Services and JET Education Management, have now been registered, with a Board of Directors whose members include some Trustees from the JET Board of Trustees and new members selected on the basis of their skills, experience and representativity.

The scene is set for these companies to operate in parallel with the Trust during 2001 and to then continue providing the above services into the future.

The Business plans indicate that the future income stream will ensure a successful operation into 2002/3.

Despite the focus on the future viability of the organisation, the Division continued to provide support to the other Divisions of Lifelong Learning, School Development, and Research and Evaluation during 2000.

Administration expenses continue to be closely controlled and the net operating cost for 2000 amounted to R0.8 million compared to R1.48 million in 1999 and R3.5 million in 1998.

The Division continued to contribute to cost recoveries through external fund management and financial management of projects.

The Division also manages the funds of the Business Trust in two of its Schooling projects, namely the Quality Learning Project and the College Collaboration Fund. These are five-year projects and will continue through to 2004.

Disbursements to approved projects continued during the year, albeit at lower levels. An amount of R8.2 million was disbursed during 2000 with a further R2.6 million on internally managed projects. This brings the total disbursements to approved projects to R407.2 million since the Trust was formed in 1992.

## INFORMATION TECHNOLOGY

Although we purchased in excess of 20 PCs and Microsoft Office 2000 during the year, these were mainly for projects funded externally out of project funds. We have made no major upgrades during the year and regarded the year 2000 as one of consolidation.

Communication has become vital to the management of our diverse projects and emphasis has been placed on internet and e-mail access.

We have purchased a number of laptops and linked these to hot-mail which re-routes from our e-mail system to the internet which can then be accessed from the laptops.

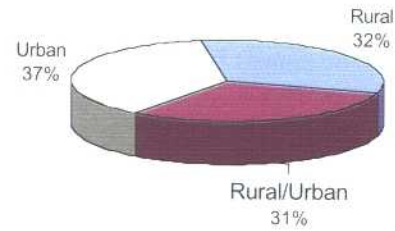
Faxing from our desktops has also been re-introduced as software has been upgraded.

We operate three servers operating a network of 28 PCs and continually upgrade as funds and new technology become available. We are considering upgrading our servers during 2001 as the current ones are becoming out of date and, although they provide backup support for each other, are likely to become more prone to breakdown.

We have continued to upgrade our desktop publishing facilities and have produced in-house publications and booklets of a high standard.

# PROJECT STATISTICS

Project Percentage By Area (1992 - 2000)



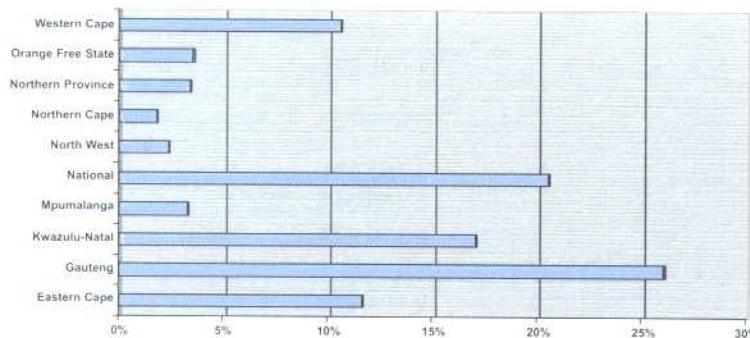
## NEW GRANTEES APPROVED BY YEAR

SECTOR	1992	1993	1994	1995	1996	1997	1998	1999	2000	TOTAL
Adult Basic Education	17	31	49	61	2	0	0	0	0	160
Early Childhood Development	18	21	17	14	0	0	0	0	0	70
Vocational & Further Education	3	4	0	0	0	0	0	0	0	7
Teacher Development	23	27	27	21	2	0	0	0	0	100
Youth Development	9	16	18	16	0	0	0	0	0	59
Special Projects	0	1	0	4	2	0	0	0	0	7
	<b>70</b>	<b>100</b>	<b>111</b>	<b>116</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>403</b>

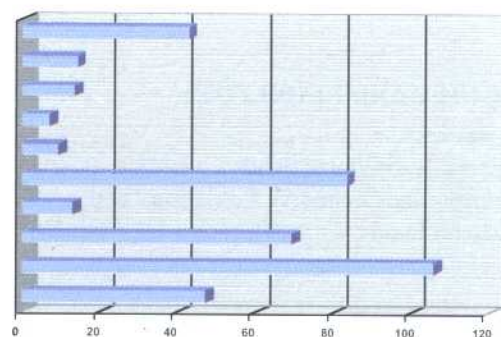
## DISBURSEMENTS 1992-2000 (Rands)

Sector	1992	1993	1994	1995	1996	1997	1998	1999	2000	Total
Adult Basic Education	393,200	11,214,791	25,096,514	33,456,490	28,243,538	22,539,936	11,697,995	1,496,589	177,212	134,316,265
Early Childhood Development	82,467	5,776,670	10,615,346	13,459,507	9,320,249	8,844,113	5,647,118	270,650	0	54,016,120
Vocational & Further Education	2,261,300	6,892,000	10,196,500	13,988,597	12,004,839	6,447,000	3,197,246	300,000	450,000	55,737,482
Teacher Development	3,420,340	10,960,749	17,296,210	25,162,030	16,587,600	13,610,021	8,803,252	3,204,587	5,690,975	104,735,764
Youth Development	0	4,361,306	10,077,144	12,325,961	7,307,708	7,001,229	3,544,153	1,015,253	1 811 670	47,444,424
Special Projects	0	155,000	425,000	605,000	5,670,664	2,000,000	2,040,291	-8,177	0	10,887,778
<b>TOTAL</b>	<b>6,157,307</b>	<b>39,360,516</b>	<b>73,706,714</b>	<b>98,997,585</b>	<b>79,134,598</b>	<b>60,442,299</b>	<b>34,930,055</b>	<b>6,278,902</b>	<b>8 129 857</b>	<b>407,137,833</b>
<b>JET PROJECTS</b>									<b>2,642,994</b>	<b>2,642,994</b>
<b>TOTAL</b>									<b>10,772,851</b>	<b>409,780,827</b>

Provincial Distribution % (1992-2000)



Provincial Distribution - R Millions (1992-2000)



# REPORT OF THE INDEPENDENT AUDITORS

We have audited the annual financial statements of the Private Sector Initiative Joint Education Trust, an extract of which is set out on this page. This extract of the annual financial statements is the responsibility of the Trustees. Our responsibility is to report on this extract of the annual financial statements.

We confirm that this extract has been properly compiled from the annual financial statements of the PSI Joint Education Trust for the year ended 31 December 2000. These annual financial statements have been prepared in accordance with South African Statements of Generally Accepted Accounting Practice. We confirm that an

unqualified audit opinion was issued on these annual financial statements.

In addition, at the request of the Trustees, the disbursements on approved projects were subject to a high degree of audit verification and we confirm that no exceptions were noted.

*Deloitte & Touche*

Deloitte & Touche  
Chartered Accountants (SA)  
Johannesburg  
22 March 2001

## ABRIDGED INCOME STATEMENT for the year ended 31 December 2000

	<u>2000</u> R	<u>1999</u> R
Gross contributions received	11 314 174	5 190 691
Interest on funds received	827 426	1 429 866
Donations received	650	65 001
Total income	<u>12 142 250</u>	<u>6 685 558</u>
Disbursements on approved projects	8 129 857	6 472 035
Disbursements - internal projects	2 642 994	314 297
Administration expenses	830 552	1 475 041
Total expenditure	<u>11 603 403</u>	<u>8 261 373</u>
Net surplus/(shortfall) for the year	538 847	(1 575 815)
Retained income at beginning of the year	9 928 948	11 504 763
Retained income at end of the year	<u>10 467 795</u>	<u>9 928 948</u>

## ABRIDGED BALANCE SHEET 31 December 2000

### ASSETS

Non-current assets	52 979	86 438
Current Assets	11 038 892	10 218 105
	<u>11 091 871</u>	<u>10 304 543</u>

### EQUITY AND LIABILITIES

#### Reserves

Special Institutions' Fund	3 162 221	3 407 979
Primary and Secondary Education Fund	2 150 645	2 038 682
General Fund	5 154 929	4 482 287
	<u>10 467 795</u>	<u>9 928 948</u>
Current liabilities	624 076	375 595
	<u>11 091 871</u>	<u>10 304 543</u>