

FUNZA LUSHAKA BURSARY PROGRAMME IMPLEMENTATION EVALUATION

Report Annexures

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Prepared for the DPME and DBE by



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Annexure A: Document Review

Goals and objectives

As part of the many efforts to address teacher supply and demand challenges, the DBE launched the Funza Lushaka Bursary Programme in 2007. The programme is intended to ensure increased numbers of well qualified teachers entering the system, encourage young people to consider teaching as a career and to target particular scarce skills in teaching (DBE, 2014c). The FLBP falls within the mandate of DBE (DBE, 2011a), as a key deliverable as indicated in the Strategic Plan 2011-2014 and the Action Plan to 2014.

The Funza Lushaka Bursary Programme articulates with Goal 14 of the Action Plan 2014, and is designed to achieve the following goals (DBE, 2013d):

- Attract quality students and ensure that students are trained in identified priority areas.
- Contribute substantially to the supply of adequately trained teachers with a focus on rural and poor schools.

The Funza Lushaka bursary scheme is seen as one of the mechanisms to be used to enhance access for high achieving students to qualify as teachers, addressing both supply and quality issues in the education system (DBE, 2011b).

Several programme objectives have been identified (DBE, 2011b):

- Employ efficient and effective recruitment mechanisms to attract quality students (aged 30 and below) to become teachers in identified priority areas;
- Increase the number of first-time enrolments in teacher education programmes by 10% each year;
- Provide financial assistance to South African youth with academic potential to enter and complete tertiary studies in teacher education programmes;
- Ensure a satisfactory completion rate of funded students; and
- Ensure that Funza Lushaka graduates are placed appropriately in schools.

Programme design

The programme is a dedicated merit-based full-cost bursary programme for students mostly under the age of 30 who wish to become teachers in identified priority areas. Bursaries are available at all the 22 universities in South Africa that offer initial teacher education programmes and funded programmes include both routes to qualifying as a teacher: either through the four-year Bachelor of Education (B Ed) degree or through a three or four year Bachelor's degree followed by a Postgraduate Certificate in Education (PGCE). Students who receive a bursary on the programme are required to sign an agreement

committing themselves to teach in a public school for the equivalent period of time they received the bursary. Primarily, the intention is to place students in poor and rural schools in the first instance.

Priority areas for Funza are identified in the bursary Implementation Protocol, which is reviewed annually to make considerations for the changing needs and circumstances at schools. The protocol was developed in 2007 and amended in 2014. Inclusion of subjects on the priority list is based on vacant posts that PEDs are supposed to fill, HEI graduate output, and learner enrolment on subjects that show greater uptake. The priority list developed in 2007 was amended in 2011 for the 2012 implementation year, by adding Geography, Economics and accounting. Geography was added because it was proving to be a popular subject among learners, yet HEIs were not producing an adequate number of students specialising in that subject. Accounting and Economics were added because there was an under supply of teachers, and learners were not able to take these as subjects because schools did not offer them even though there was a high interest among learners (DBE, 2012b).

Table 10: Funza Lushaka Bursary current priority areas

Foundation Phase	Languages	Sciences	Mathematics	Technology
African Languages	English (Intermediate, Senior and FET phases)	Physical Science (FET Phase)	Mathematics (All phases)	Civil, Electrical, and Mechanical (FET Phase)
English	African Languages	Life Science	Maths Literacy	Computer Applications Technology
	(Intermediate, Senior and FET phases)	(FET Phase)	(All phases)	(FET Phase)
Afrikaans		Agricultural Science		Engineering Graphics and Design
		(FET Phase)		(FET Phase)
		Natural Sciences		Information Technology
		(Intermediate and Senior)		(FET Phase)
		Geography (FET Phase)		Technology (Intermediate and senior phases)

Source: DBE, 2012b, *Funza Lushaka Report 2012*

Programme Management and Administration

The Department of Basic Education through its Initial Teacher Education Directorate manages the programme overall, while the National Student Financial Aid Scheme (NSFAS) on behalf of the DBE is responsible for its financial administration. The Department collaborates closely with Higher Education Institutions (HEIs) in order to ensure that students are properly selected, and that the disbursement of funds to qualifying students is adequately managed. HEIs have a Funza Lushaka management structure comprising an academic co-coordinator, administration officer and a financial aid officer/administrator. At some institutions, the Head of School plays the role of the academic co-coordinator. The HEI management structure is part of the bursary selection panel which also includes provincial representation to ensure that bursary funding is directed to priority- areas and subjects. HEIs have the responsibility of informing bursars when they have been awarded a bursary and this is done through short message service (sms), email messaging, phone calls as well as posting lists of awarded bursars on notice boards. In 2011, there were plans to develop letter templates that would be used to send formal written responses to applicants (DBE, 2011b). It is however not clear in subsequent monitoring reports if HEIs used letters as a form of communication with bursars. The DBE is now also part of the selection panel, a new innovation introduced in 2012 because of the perception that DBE participation in selection committee meetings would ensure uniformity across universities. However, universities cited the allocation of time for selection meetings as inadequate, and some delays at institutions delayed the selection process which would then not be completed timeously (DBE, 2012b). Participation of DBE officials is regarded as costly from a time perspective and in real monetary value terms¹ (DBE, 2013d).

Another change introduced in 2012 was that national criteria were the main guide for selection of bursars, but the provincial needs also directed selection decisions. Phase targets were developed for awarding bursaries for specific phases of study, with the B Ed getting the larger allocation. The allocations for all phases that were determined are as follows (DBE, 2012b).

Table 11: Phase allocations in 2012

Bachelor of Education				Other B degrees	PGCE			
FP	IP	SP	FET		FP	IP	SP	FET
20%	20%	10%	10%	10%	5%	5%	10%	10%

Source: DBE, 2012b, *Funza Lushaka Report 2012*

The management of the programme is guided by explicit policies and guidelines for:

- a) Amount available for disbursement in the following academic year
- b) Management of the bursary scheme
- c) Determining individual bursary values at institutions

¹¹ The actual cost could not be determined from the document review

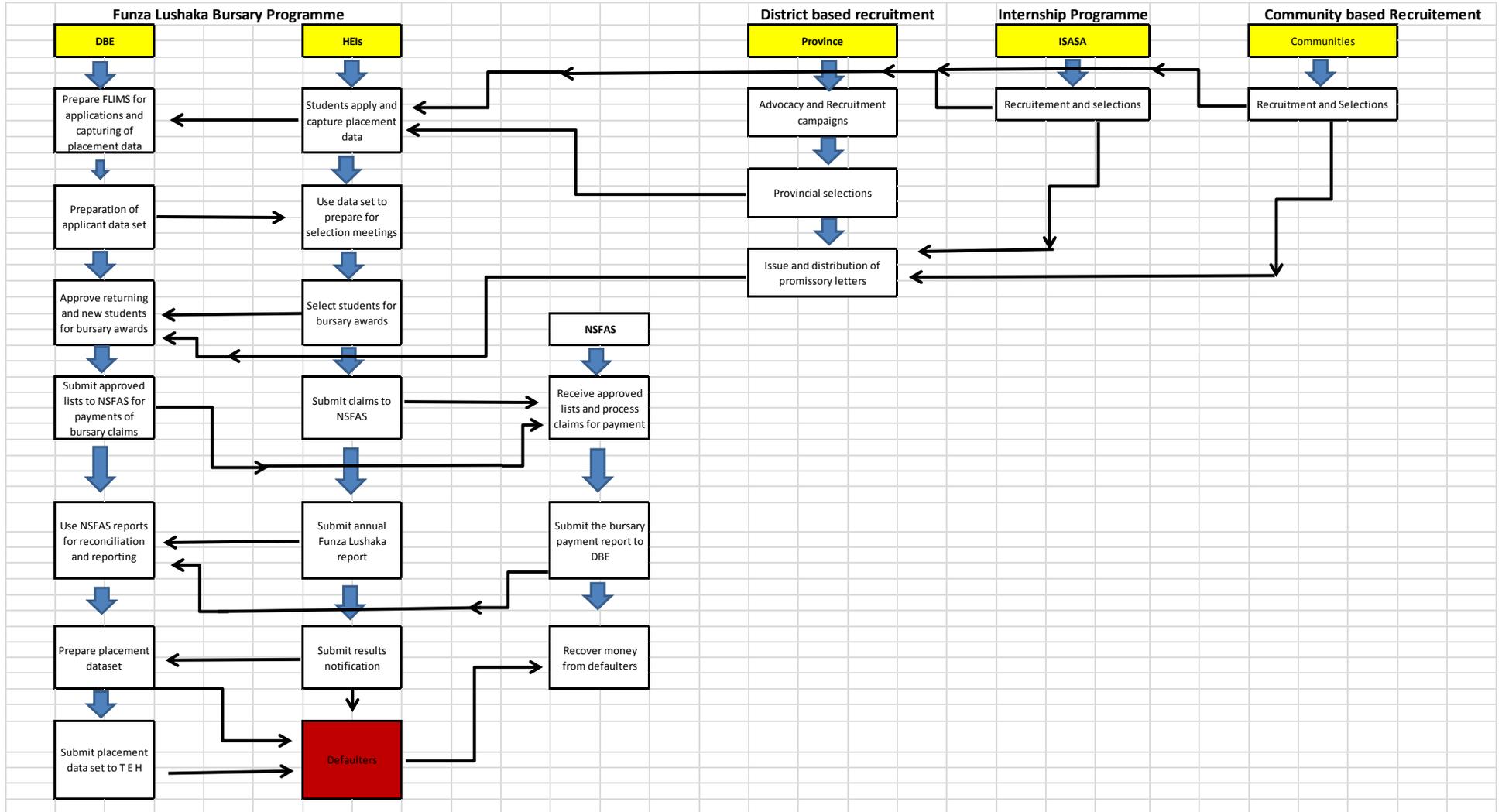
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- d) Allocation of funds to higher education institutions
 - e) Teaching specialization which will be funded
 - f) Quotas for bursary allocation to students by qualification type and phase specialization
 - g) Procedures for application for the bursary
 - h) Criteria and processes for award of the bursary
 - i) Disbursement of bursaries to students
 - j) Placement process (DBE, 2011b)

In 2011, institutions were reporting poorly on mechanisms they used for tracking academic progress. Tracking excluded bursars for inclusion in selection processes in successive years, monitoring continued enrolment for priority areas, and authorising final selection lists forwarded to the department (DBE, 2011b).

As a multi-stakeholder programme, the Funza Lushaka Bursary Programme involves several layers of administrative responsibility. Funding is provided through central government, applications are managed centrally via a web-based application system, recruitment is a combined responsibility of HEIs and the DBE, bursary management and monitoring takes place through the HEIs and the NSFAS (who administers the funding on behalf of the DBE), and placement and employment of teachers is primarily a responsibility of the PEDs, with support from the DBE at particular points.

The programme has five key loci of implementation: national processes at DBE; provincial processes, District and community processes, the internship programme and HEI processes. These are reflected in the flow diagram below (DBE, 2014d) with roles and responsibilities of stakeholders elaborated in Table 12.

Figure 7: Funza Lushaka business process



Roles and responsibilities of each stakeholder are explicitly defined for each of the specific programme elements as reflected in Table 12.

Table 12: Roles and responsibilities of stakeholders

	DBE	PROVINCE	HEI
District based recruitment	<ul style="list-style-type: none"> • Revision of the district based concept document • Revision of Funza Lushaka Policies and Process document 	<ul style="list-style-type: none"> • Establishment and constitution of the Provincial Co-ordination Committee 	
	<ul style="list-style-type: none"> • Develop presentation guidelines for the District based advocacy and recruitment 	<ul style="list-style-type: none"> • Development and Submission of the Advocacy and Recruitment management plan to DBE 	
	<ul style="list-style-type: none"> • Convene inter provincial meeting to discuss District based advocacy and recruitment strategies • Monitor and support the provinces during the advocacy and campaign 	<ul style="list-style-type: none"> • Advocacy/District Briefing sessions and Recruitment • Receiving and consolidation of application forms from the Districts 	<ul style="list-style-type: none"> • Provide information on admission requirements, information brochures and application forms for admission
	<ul style="list-style-type: none"> • Monitor and support the Provincial selections 	<ul style="list-style-type: none"> • Provincial selection meetings 	<ul style="list-style-type: none"> • Participate during the selection meetings
	<ul style="list-style-type: none"> • Monitor and support the Orientation of selected students 	<ul style="list-style-type: none"> • Orientation of selected students 	
	<ul style="list-style-type: none"> • Prepare the FLIMS for the new bursary application cycle 	<ul style="list-style-type: none"> • Capturing of the Funza Lushaka bursary Application forms electronically 	<ul style="list-style-type: none"> • Assist in the capturing of the Funza Lushaka bursary application forms
	<ul style="list-style-type: none"> • Consolidation of the provincial signed off lists 	<ul style="list-style-type: none"> • Submission of the signed off list 	<ul style="list-style-type: none"> • Receive the preliminary list of selected students to facilitate admission
	<ul style="list-style-type: none"> • Issuing of promissory letters 	<ul style="list-style-type: none"> • Distribute the promissory letters to Districts and Schools • Province assist students to Register at HEIs 	<ul style="list-style-type: none"> • Assist students with promissory letters to register and access bursary benefits • Monitor the academic progress of the students and

	DBE	PROVINCE	HEI
			provide the report to DBE
Teacher Internship/ assistant programmes	DBE	ISASA	HEI
	<ul style="list-style-type: none"> • Revision of the concept document for the internship programme • Assist in the Development of the messages for the advertisement 	<ul style="list-style-type: none"> • Develop advertisement messaging for the new intake • Arrange for broadcasting and publishing of the advertisement in the selected media platforms 	<ul style="list-style-type: none"> • Provide advertisement platform for the new intake
	<ul style="list-style-type: none"> • Monitor and support the process of checking the application forms for completeness 	<ul style="list-style-type: none"> • Receive and check the applications forms for completeness 	
	<ul style="list-style-type: none"> • Monitor and support Initial sifting of application forms 	<ul style="list-style-type: none"> • Initial sifting of application forms 	
	<ul style="list-style-type: none"> • Monitor and support the writing of the selection tests 	<ul style="list-style-type: none"> • Invite the initially selected students to write selection tests 	
	<ul style="list-style-type: none"> • Monitor and support the marking of selection tests 	<ul style="list-style-type: none"> • Marking of selection tests 	
	<ul style="list-style-type: none"> • Participate in the Final Selection Interviews 	<ul style="list-style-type: none"> • Conduct final selection Interviews 	
	<ul style="list-style-type: none"> • Monitor and support orientation Workshop of selected students 	<ul style="list-style-type: none"> • Conduct orientation Workshop of selected students 	
	<ul style="list-style-type: none"> • Monitor and support the registration of students with UNISA 	<ul style="list-style-type: none"> • Assist the selected students to apply and register with UNISA 	<ul style="list-style-type: none"> • Assist students with promissory letters to register and access bursary benefits
	<ul style="list-style-type: none"> • Monitor and support the placement of Interns at host schools 	<ul style="list-style-type: none"> • Arrange the placement of Interns at host schools 	
	<ul style="list-style-type: none"> • Support and monitor Mentors' workshop 	<ul style="list-style-type: none"> • Arrange and conduct Mentors' workshop 	
	<ul style="list-style-type: none"> • Monitor and support Academic enrichment workshops 	<ul style="list-style-type: none"> • Arrange and conduct Academic enrichment workshops 	<ul style="list-style-type: none"> • Participate in the academic enrichment workshops

	DBE	PROVINCE	HEI
Funza Lushaka bursary programme	<ul style="list-style-type: none"> • Preparation of the FLIMS for the new Funza Lushaka Bursary application cycle and capturing of placement information • Revision of Funza Lushaka Policies and Processes document • Revision of the Implementation Protocol 	<ul style="list-style-type: none"> • Remind and encourage students to re/apply • Participate in the revision of the Policies and Processes document • Participate in the revision of the Implementation Protocol 	<ul style="list-style-type: none"> • Participate in the revision of the Policies and Processes document • Participate in revision of the Implementation Protocol
	<ul style="list-style-type: none"> • Preparation of applicants database to be send to HEIs 	<ul style="list-style-type: none"> • Use the applicant database to prepare for selection meetings 	
	<ul style="list-style-type: none"> • Approve the confirmed re-awards of bursaries to returning students 	<ul style="list-style-type: none"> • Confirmation of re-turning students for bursary re-award 	
	<ul style="list-style-type: none"> • Participate in the Selection of new applicants for bursary awards 	<ul style="list-style-type: none"> • Arrange and participate in the selection meetings of new applicants for bursary awards 	
	<ul style="list-style-type: none"> • Receive and consolidate the recommended lists of new bursary applicants • Approve the selected students for bursary awards 	<ul style="list-style-type: none"> • Submit lists of selected students to DBE for approval 	
	<ul style="list-style-type: none"> • Submit the approved lists to NSFAS for payment of claims by HEIs 	<ul style="list-style-type: none"> • Prepare and submit the claims on behalf of students to NSFAS 	<ul style="list-style-type: none"> • Receive the approved lists and process claims for payment
	<ul style="list-style-type: none"> • Use NSFAS reports 	<ul style="list-style-type: none"> • Prepare and submit 	<ul style="list-style-type: none"> • Submit the bursary

	DBE	PROVINCE	HEI
	for reconciliation and reporting	annual Funza Lushaka report	payment reports to DBE
	<ul style="list-style-type: none"> • Prepare placement database and hand it over to TEH Directorate 	<ul style="list-style-type: none"> • Submit students results notification for confirmation of placement legibility to DBE 	<ul style="list-style-type: none"> • Recover money from defaulting students
	DBE	COMMUNITY	HEIs
Community based recruitment	<ul style="list-style-type: none"> • Develop a concept document for the community based recruitment approach • Conduct advocacy and recruitment campaigns • Make the screening forms available to the communities 	<ul style="list-style-type: none"> • Assist with the advocacy and recruitment campaigns • Distribute the screening forms 	
	<ul style="list-style-type: none"> • Use the screening forms to select the suitable candidates 	<ul style="list-style-type: none"> • Collect the screening forms and submit to DBE 	
	<ul style="list-style-type: none"> • Announce the suitable candidates that have been selected • Invite HEIs to community base recruitment meeting • Create a database for community based recruited students • Make Funza Lushaka application form available to the community • 	<ul style="list-style-type: none"> • Distribute application forms to suitable candidates • Distribute the Funza Lushaka application forms • Collect and consolidate the completed Funza Lushaka bursary application forms and submit to DBE 	<ul style="list-style-type: none"> • Provide information on admission requirements, information brochures and application forms for admission • Provide status report for the students application for admission
	<ul style="list-style-type: none"> • Consolidate and prepare for the issuing of promissory letters 	<ul style="list-style-type: none"> • Distribute promissory letters to qualifying students 	<ul style="list-style-type: none"> • Assist students with promissory letters to register and access bursary benefits

	DBE	PROVINCE	HEI
			<ul style="list-style-type: none"> • Monitor the academic progress of the students and provide the report to DBE

Source: DBE, 2014e. *Funza Lushaka bursary programme business process*²

From 2011 - 2013, the following administrative challenges were identified in the monitoring reports (DBE, 2011b; 2012b, 2014c):

- When institutions requested that closing dates for receiving applications for the bursary be delayed until registrations commenced to give a chance to students enrolling at particular institutions to apply, this delayed responses to applicants, as notification of award of the bursary occurred after students had registered.
- HEIs do not have administrative capacity as Funza is additional to their responsibilities. at institutions. The requirements of DBE for processing applications, selections, administering funds and dealing with student queries and reports demands extra admin capacity, which universities cannot afford to source.
- Some HEIs struggle with recruitment, failing to attract significant numbers of students in some priority areas e.g. Engineering Technology.
- Final year students writing supplementary and special examinations required funds to be reserved for them and later allocated to other students should they be successful in their examinations. This meant that some applicants would get a late notification of the outcome of their application.
- It is difficult to track bursars and hand defaulters over to NSFAS as the Initial Teacher Education Directorate has no way of accessing information on graduates when they are employed or they have completed their studies.
- Students who reject the bursary after their selection has been confirmed and their names have been submitted to NSFAS result in under-spending.
- Because only ITE officials are participating in selection committees, their limited capacity leads to delays in finalizing selected lists and awarding of bursaries.
- Allocation of funds to approved bursars takes place in April and this creates financial challenges for students at the time of registration in February and during the first few months of the year.

² Taken verbatim from source document

Recruitment, application and selection criteria

Beneficiaries of the bursary are students enrolled in Bachelor of Education (BEd) and Postgraduate Certificate in Education (PGCE) programmes at HEIs. Students enrolled for other Bachelor degrees such as Bachelor of Science (BSc), Bachelor of Commerce (BCom) or Bachelor of Agriculture (BAgric) may also be recruited into a PGCE qualification. Eligible students must be South African, have been accepted into a teaching programme, show commitment to a teaching career, be studying in one of the agreed priority phases and areas, and sign an agreement to work in a public school on the completion of their studies. The programme documents state an interest in favouring candidates from rural areas and those in financial need.

Recruitment in the first few years of the programme was primarily a direct application process to the DBE, which is an online process. Prospective students apply via: www.funzalushaka.doe.gov.za from October to January. Some institutions supplemented online applications with paper-based applications to support new applications with no online access. This however presents workload challenges as most universities do not have the capacity to capture the applications (DBE, 2011b).

In addition to this, new District and Community-Based recruitment programmes were introduced in 2012 and 2013 respectively. The District programme introduced in 2012 targets learners from rural and poor communities. The rationale behind district recruitment is that teacher demand is determined at district level, so recruitment should be based on forecast of teacher demand in the district. Learners from specific districts are more likely to want to teach in those districts, and district recruitment will provide an equal opportunity for students from rural and disadvantaged areas to access the bursary. There is provision of paper based applications, which takes away the barrier of lack of computers for online application, but online applications can also be made. Universities are tasked with the responsibility of capturing the data from the paper based applications. Although the district based recruitment is supposed to be based on projected demand, it seems like the policy document has already set out targets for bursaries that can be awarded in each district (DBE, 2014c).

There is evidence suggesting that the district based recruitment is achieving the intended results. In 2012, out of the 2000 bursaries set aside for the district based recruitment strategy, 1193 students were awarded the bursary, and 2 000 had been selected for the 2014 intake. Table 13 below highlights the distribution of the district beneficiaries in 2012. Greater uptake of the bursary is evident in KZN and Limpopo, with the most interest in the bursary displayed in the North West which awarded more bursaries than allocated.

Table 13: District based recruitment selected beneficiaries

Province	Bursary Allocation	District based awarded bursary
Eastern Cape	488	145
Free State	134	110
Gauteng	106	81

Province	Bursary Allocation	District based awarded bursary
KZN	478	375
Limpopo	378	230
Mpumalanga	142	60
Northern Cape	48	15
North West	160	170
Western Cape	66	7
Grand Total	2000	1193

Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

Since 2007, some 30 430 students have received Funza Lushaka bursaries, as highlighted in Table 14 below.

Table 14: Funza Lushaka Bursary Recipients 2007 – 2013

HEI	2007	2008	2009	2010	2011	2012	2013	Number of individuals who received bursary 2007 -2013
CPUT	233	349	713	794	648	758	862	1979
CUT	20	71	235	241	291	312	408	786
DUT	10	30	65	71	80	134	221	355
NIHE Mp	137	126	80	48				152
NIHE NC	123	210	248	231	193	234	322	739
NMMU	178	283	561	632	584	774	914	1751
NWU	206	309	638	753	661	948	1257	2287
RU	20	20	38	42	31	27	35	183
TUT	101	160	398	457	417	583	728	1269
UCT	35	41	70	82	64	73	69	274
UFH	158	263	389	499	460	558	660	1325
UFS	181	274	519	610	517	689	878	1842
UJ	144	229	424	443	401	582	750	1465
UKZN	181	315	720	794	701	882	1180	2172
UL	176	258	442	461	386	518	635	1237
UP	180	270	515	578	567	628	875	1703
US	186	271	501	558	476	569	639	1453
UWC	94	148	280	356	317	503	440	1014
WSU	289	386	544	552	433	586	703	1655

HEI	2007	2008	2009	2010	2011	2012	2013	Number of individuals who received bursary 2007 -2013
UNISA	362	398	310	297	262	398	511	1420
UNIVEN	105	149	281	302	239	362	459	957
UNIZUL	368	367	755	793	550	958	1240	2815
WITS	182	262	464	479	399	552	726	1426
Total	3669	5189	9190	10073	8677	11628	14512	30430

Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

The number of bursaries awarded has increased each year between 2007 – 2010, dipped in 2011, and peaked again in 2011 – 2013. The decrease in the number of bursaries that could be awarded in 2011 was “*due to the inflation related adjustment by Treasury (about 5%) on the 2010 allocation, while the fees at many of the universities increased by over 10%*” (DBE, 2012b). In 2012 the allocation was increased from R 449 400 000 in 2011 to R 671 912 000, enabling an increase in the number of bursaries awarded.

Training and Student Profiles

In 2012, DBE introduced an information sheet to gather comprehensive information on the qualifying bursars. The qualifying bursars provided information by completing the instrument on-line. The annual reports on the Funza Lushaka Bursary Programme, written by the DBE contains a comprehensive and detailed profile of the bursars. Information provided includes: racial, gender, age and phase specialisation profiles; the number of bursaries awarded with average values per institution; the number of bursars expected to apply, as well as the percentage qualified to teach by learning area.

Examples of the information gleaned from this exercise include statistics (for the time period 2007-2012 such as:

- Almost 60% of the bursars were African
- Just over two thirds of the bursars were female
- On average 36% of bursars aimed to specialise in FET phase teaching only

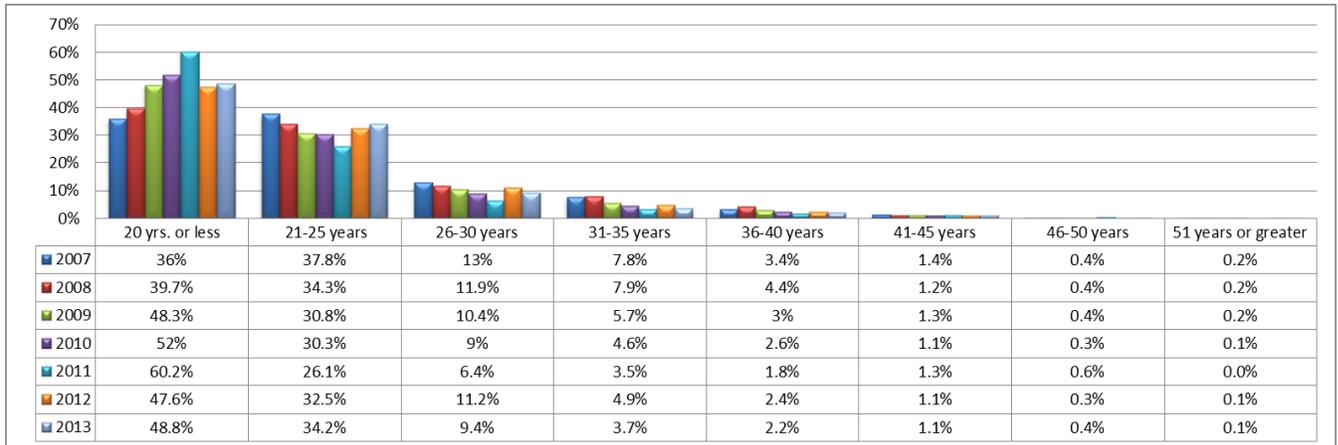
Beneficiaries of the bursary are students enrolled in Bachelor of Education (BEd) and Postgraduate Certificate in Education (PGCE) programmes at HEIs (DBE, 2013a). Students enrolled for other Bachelor degrees such as Bachelor of Science (BSc), Bachelor of Commerce (BCom) or Bachelor of Agriculture (BAgric) may also be recruited into a PGCE qualification (DBE, 2014b). Eligible students must be South African, have been accepted into a teaching programme, show commitment to a teaching career, be studying in one of the agreed priority phases and areas, and sign an agreement to work in a public school on the completion of their studies. The programme documents state an interest in favouring

candidates from rural areas and those in financial need, and the evaluation will explore the extent to which these criteria are able to be implemented within the current programme design (DBE, 2014c).

The Funza Lushaka bursary addresses the challenge of an ageing workforce addressed earlier in the report, as one of its aims is to attract young people under 30 into the teaching profession. To date, this objective has been achieved significantly as 90%³ of bursary beneficiaries from 2007 – 2013 were under the age of 30. However, some people not in the targeted age group are getting bursaries and it would be useful to understand why this is the case. Figure 8 shows the age distribution of beneficiaries from 2007 – 2013.

³ Calculation based on 29 954 beneficiaries (DBE report on Funza Lushaka 2013)

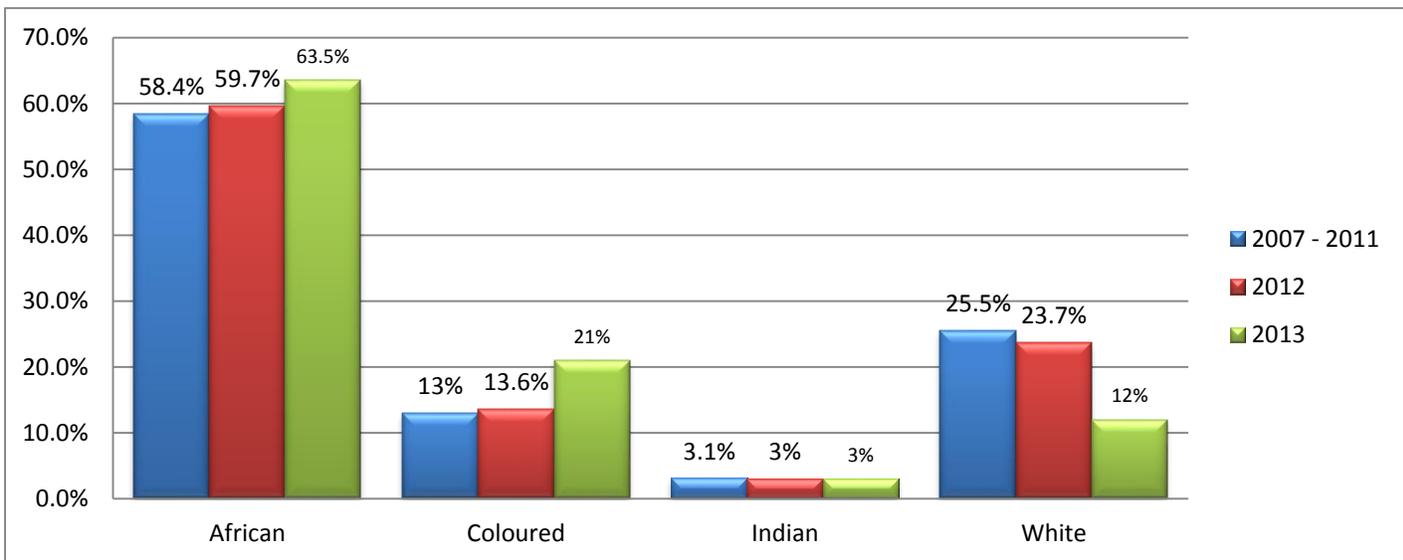
Figure 8: Age profile of beneficiaries when first registering



Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

The bursary is also addressing racial inequality in access to university and higher education as the award is a full bursary, it enables students who would otherwise not have afforded to study go to university. Furthermore, it also raises awareness of teaching as a career option for black students. Figure 9 shows the racial composition of bursary recipients from 2007 – 2013.

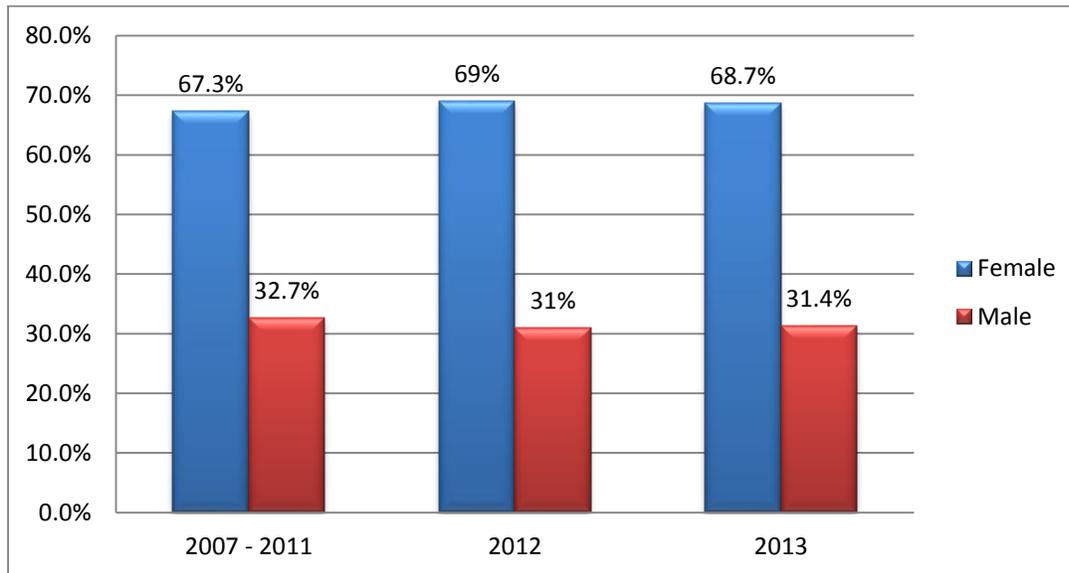
Figure 9: Racial composition of Funza Lushaka beneficiaries (2007 – 2013)



Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

African students constitute the highest percentage of beneficiaries (Figure 10) and more female students than males have been awarded the bursary.

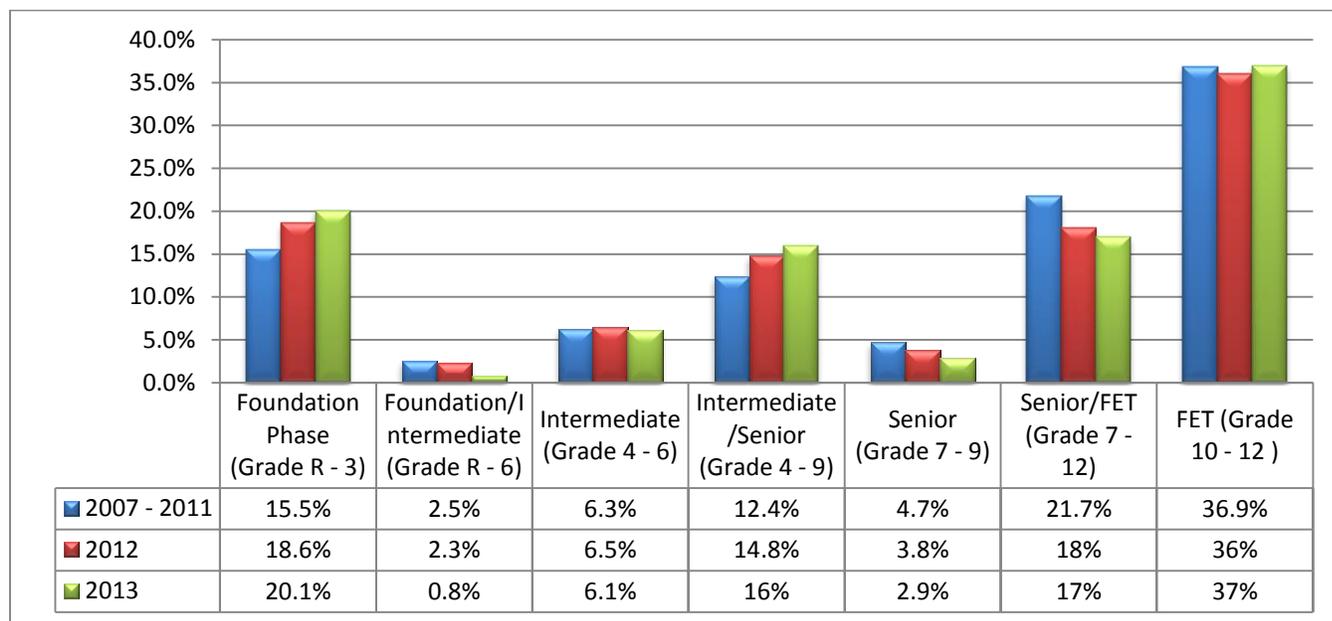
Figure 10: Gender composition of Funza Lushaka bursary beneficiaries (2007 – 2013)



Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

There seems to be a challenge in that most beneficiaries want to study to teach at FET as highlighted in Figure 11. Enrolment for study for this phase was equally high in 2007 – 2011 (36.9%) and in 2012 (36%). Specialisation in Foundation/Intermediate phase had the lowest enrolment at under 2.6% between 2007-2011; 2012, and 2013.

Figure 11: Phase specialisations of bursars (2007 – 2013)



Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

As part of the Funza Lushaka bursary programme, the DBE has entered into partnership with the Independent Schools Association of South Africa, for an internship programme to recruit and train effective maths and science teachers. The first cohort of 20 on this programme was recruited in 2013, and a further 50 students were recruited for 2014. All students study through UNISA and they work with mentors for coaching in the classroom during their experiential learning (DBE, 2014a). Mentoring not only supports student teachers with pedagogical skills and knowledge, but students also get pastoral mentoring and at times academic support to help them to succeed in their university studies (Mawoyo, 2010).

Funding arrangements

Between 2007 and 2012 the amount spent on bursaries increased from R109 770 701 in 2007 to R661 387 795 in 2012. In 2014 estimates are that the disbursement to Funza Lushaka bursaries will be R947 499 000 covering a total of 14 500 bursaries. These figures show a steady increase in the amount of funding committed to the project in the years since its inception. Although there has been an increase in funding every year, in real terms, the increase in costs of fees, accommodation and living expenses has meant that the number of students funded has not increased due to an increase in funding. Table 15 below elaborates.

In 2012 the national average bursary size was R56 696 across the 22 institutions. The Funza Lushaka Bursary is comprehensive in that it covers not only tuition fee costs, but also accommodation, living and book expenses. It is therefore known to be an extremely generous bursary as the average amounts are

higher than those given to students funded through the NSFAS bursary scheme. The amount given to any one student is capped at R75 000 for one year of study.

Funds are allocated to institutions using a distribution model based on the amount required to fund projected returning students plus the cost of new bursaries, adjusted to accommodate smaller institutions. Funding increases for each year are aimed at covering an increase in rising university fees, residence fees and general living costs.

Table 15: Total value and number of bursaries awarded 2007 - 2013⁴

HEI	2007	No. of bursaries	2008	No. of Bursaries	2009	No. of bursaries	2010	No. of Bursaries	2011	No. of Bursaries	2012	No. of Bursaries	2013* ⁵	No of Bursaries	Total	Bursary recipients 2007 - 2013
CPUT	R 7 169 000	233	R 10 828 000	349	R 27 774 904	713	R 34 163 363	794	R 30 265 400	648	R 45 180 000	758	R 56 298 000	862	R 211 678 667	1979
CUT	R 800 000	20	R 2 420 000	71	R 7 725 434	235	R 10 133 870	241	R 11 742 600	291	R 18 720 000	312	R 25 865 672	408	R 77 407 576	786
DUT	R 380 817	10	R 1 200 000	30	R 2 795 000	65	R 3 281 433	71	R 1 610 000	80	R 8 442 000	134	R 14 365 000	221	R 32 074 250	355
NIHE (Mp)	R 1 678 950	137	R 1 885 000	126	R 2 108 250	80	R 1 968 000	48							R 7 640 200	152
NIHE (NC)	R 3 169 250	123	R 3 200 000	210	R 6 568 960	248	R 6 330 450	231	R 7 681 400	193	R 9 313 200	234	R 14 490 000	322	R 50 753 260	739
NMMU	R 7 120 000	178	R 10 698 980	283	R 25 020 650	561	R 30 905 061	632	R 32 726 230	584	R 45 138 320	774	R 60 423 770	914	R 212 033 011	1751
NWU	R 7 126 929	206	R 10 786 883	309	R 24 908 726	638	R 29 351 000	753	R 27 517 000	661	R 43 131 900	948	R 64 475 000	1257	R 207 297 438	2287
RU	R 772 630	20	R 1 000 038	20	R 1 789 022	38	R 2 194 930	42	R 1 850 590	31	R 1 782 000	27	R 2 450 000	35	R 11 839 210	183
TUT	R 3 530 000	101	R 6 000 000	160	R 15 908 900	398	R 19 737 000	457	R 18 974 000	417	R 31 060 650	583	R 41 184 000	728	R 136 394 550	1269
UCT	R 1 308 000	35	R 1 640 000	41	R 3 400 000	70	R 4 510 000	82	R 3 717 700	64	R 4 737 270	73	R 4 830 000	69	R 24 142 970	274
UFH	R 6 318 918	158	R 10 315 000	263	R 17 594 460	389	R 24 403 160	499	R 26 627 600	460	R 37 278 000	558	R 46 130 000	660	R 168 667 138	1325
UFS	R 7 240 000	181	R 10 640 000	274	R 24 930 142	519	R 30 353 577	610	R 28 097 597	517	R 41 395 200	689	R 58 466 027	878	R 201 122 543	1842
UJ	R 4 977 307	144	R 9 160 000	229	R 18 648 635	424	R 21 264 000	443	R 21 074 560	401	R 34 037 290	582	R 49 276 500	750	R 158 438 292	1465
UKZN	R 6 404 500	181	R 12 875 044	315	R 33 451 220	720	R 40 409 135	794	R 41 408 855	701	R 57 021 250	882	R 79 858 500	1180	R 271 428 504	2172
UL	R 5 551 514	176	R 9 025 335	258	R 15 414 117	442	R 19 142 797	461	R 19 106 073	386	R 29 267 005	518	R 41 715 768	635	R 139 222 609	1237

⁴ DBE 2013 Funza Lushaka report

⁵ Data for 2013 was provided in June and may not include the full number of beneficiaries by the end of the year.

UNISA	R 2 716 474	362	R 4 351 600	398	R 8 960 775	310	R 10 438 650	297	R 10 202 160	262	R 16 785 430	398	R 22 637 746	511	R 76 092 835	1420
UNIVEN	R 3 995 680	105	R 6 000 000	149	R 14 050 000	281	R 16 320 000	302	R 13 829 000	239	R 23 826 000	362	R 32 110 000	459	R 110 130 680	957
UNIZUL	R 7 192 100	368	R 10 750 000	367	R 25 133 300	755	R 31 696 258	793	R 24 200 000	550	R 43 754 000	958	R 57 916 188	1240	R 200 641 846	2815
UP	R 7 172 600	180	R 10 704 391	270	R 25 080 316	515	R 31 033 000	578	R 30 261 000	567	R 39 264 700	628	R 58 350 000	875	R 201 866 007	1703
US	R 7 200 000	186	R 10 656 000	271	R 25 013 634	501	R 30 690 000	558	R 28 545 000	476	R 37 386 000	569	R 44 403 000	639	R 183 893 634	1453
UWC	R 3 706 894	94	R 6 000 000	148	R 12 253 752	280	R 15 664 000	356	R 14 182 350	317	R 25 207 080	503	R 24 157 860	440	R 101 171 936	1014
WITS	R 7 015 418	182	R 10 331 548	262	R 21 940 715	464	R 24 521 717	479	R 23 133 500	399	R 36 360 000	552	R 49 473 000	726	R 172 775 898	1426
WSU	R 7 223 720	289	R 10 551 500	386	R 17 267 720	544	R 23 687 202	552	R 21 342 500	433	R 32 300 500	586	R 41 521 250	703	R 153 894 392	1655
Grand Total	R 109 770 701	3669	R 171 019 319	5189	R 377 738 632	9190	R 462 198 603	10073	R 438 095 115	8677	R 661 387 795	11628	R 890 397 281	14512	R 3 110 607 446	30430

As highlighted previously, the impact of the increase in bursary value was eroded by inflation and increase in university fees, accommodation and living expenses. Proportionally, the number of bursars who could be funded with the substantial increase in bursary allocation was reduced because of an average higher cost as depicted in Table 16.

Table 16: Comparison of value of bursaries and number of bursars in 2007 and 2012

Institution	Awarded value of bursaries in 2007	No. of bursars in 2007	Average value of bursary in 2007	Awarded value of bursaries in 2012	No. of bursars in 2012	Average value of bursary 2007	Difference of average value of bursary in 2007 and 2012
CPUT	R 7 169 000	233	R 30 768	R 45 180 000	758	R 59 604	R 28 836
CUT	R 800 000	20	R 40 000	R 18 720 000	312	R 60 000	R 20 000
DUT	R 380 817	10	R 38 082	R 8 442 000	134	R 63 000	R 24 918
NIHE (Mp)	R 1 678 950	137	R 12 255				
NIHE (NC)	R 3 169 250	123	R 25 766	R 9 313 200	234	R 39 800	R 14 034
NMMU	R 7 120 000	178	R 40 000	R 45 138 320	774	R 58 318	R 18 318
NWU	R 7 126 929	206	R 34 597	R 43 131 900	948	R 45 498	R 10 901
RU	R 772 630	20	R 38 632	R 1 782 000	27	R 66 000	R 27 369
TUT	R 3 530 000	101	R 34 950	R 31 060 650	583	R 53 277	R 18 327
UCT	R 1 308 000	35	R 37 371	R 4 737 270	73	R 64 894	R 27 523
UFH	R 6 318 918	158	R 39 993	R 37 278 000	558	R 66 806	R 26 813
UFS	R 7 240 000	181	R 40 000	R 41 395 200	689	R 60 080	R 20 080
UJ	R 4 977 307	144	R 34 565	R 34 037 290	582	R 58 483	R 23 919
UKZN	R 6 404 500	181	R 35 384	R 57 021 250	882	R 64 650	R 29 266
UL	R 5 551 514	176	R 31 543	R 29 267 005	518	R 56 500	R 24 957
UNISA	R 2 716 474	362	R 7 504	R 16 785 430	398	R 42 174	R 34 670
UNIVEN	R 3 995 680	105	R 38 054	R 23 826 000	362	R 65 818	R 27 764
UNIZUL	R 7 192 100	368	R 19 544	R 43 754 000	958	R 45 672	R 26 128
UP	R 7 172 600	180	R 39 848	R 39 264 700	628	R 62 523	R 22 676
US	R 7 200 000	186	R 38 710	R 37 386 000	569	R 65 705	R 26 995
UWC	R 3 706 894	94	R 39 435	R 25 207 080	503	R 50 113	R 10 678
Wits	R 7 015 418	182	R 38 546	R 36 360 000	552	R 65 870	R 27 323
WSU	R 7 223 720	289	R 24 996	R 32 300 500	586	R 55 120	R 30 125
Total	R 109 770 701	3669	R 29 918	R 661 387 795	11628	R 56 879	R 26 960

Note: Calculations based on figures from monitoring reports

Ultimately, although institutions were getting as much as more than six times the amount of money for bursaries in 2012 compared to 2007, this money could only be distributed to about twice or four times more students, depending on the value of the bursary, based on the fee structure in that

university. Based on the national average, the value of bursaries was six times more in 2012 than in 2007, but this was able to fund only three times as many students.

The Funza Lushaka Bursary is comprehensive in that it covers not only tuition fee costs, but also accommodation, living and book expenses. It is therefore known to be an extremely generous bursary as the average amounts are higher than those given to students funded through the NSFAS bursary scheme. The amount given to any one student is capped at R75 000 for one year of study (DBE 2014c).

Funds are allocated to institutions using a distribution model based on the amount required to fund projected returning students plus the cost of new bursaries, adjusted to accommodate smaller institutions (DBE, 2014c). Table 17 below highlights the bursary values within institutions, for 2012.

Table 17: Highest and lowest bursary amount within institutions

HEI	Lowest bursary amount	Highest bursary amount	Average value
CPUT	30000	60000	R 59 672
CUT	60000	60000	R 60 000
DUT	63000	63000	R 63 000
UFH	66000	66000	R 66 000
UFS	19059	61500	R 60 050
UL	17156	60841	R 56 462
NIHE NC	39800	58700	R 39 878
NMMU	37780	61500	R 58 307
NWU	*4600 ⁶	61500	R 45 438
RU	66000	66000	R 66 000
TUT	30000	53850	R 53 243
UCT	39090	66000	R 64 924
UJ	30000	66000	R 59 151
UKZN	32500	65000	R 64 641
UP	55000	66000	R 62 532
UNISA	*7200	66000	R 41 760
US	40000	66000	R 65 727
UNIVEN	48210	66000	R 65 608
UWC	34850	50000	R 49 917
WITS	42000	66000	R 65 867
UNIZUL	*4700	47000	R 45 601
WSU	30250	55500	R 55 028
Missing	56610	56610	R 56 610
		National average	R 56 696

Source: DBE, 2012b, *Funza Lushaka Report 2012*

⁶ * The low value for the bursary is due to a small number of students who are repeating a single subject or, in the case of UNISA, taking a single subject.

The Funza Lushaka programme strives to fund at least 25% of the number of students registered for an initial teaching qualification. This target has been achieved at the majority of the universities, but there remain some institutions where the total number of bursars is below this target falling within the range from 17% to 24% (DBE, 2012b). Table 18 highlights the proportion of students getting the bursary in relation to all students studying towards an initial teacher education qualification in that university.

Table 18: Number of FL bursars compared to students enrolled for an initial teaching qualification

HEI	2012 B.Ed& PGCE Enrolment(1)	Funded by Funza Lushaka in 2012	Percentage Funded by Funza Lushaka 2012
CPUT	3126	733	23%
CUT	2104	310	14%
DUT	788	140	17%
NIHE NC	582	241	41%
NMMU	1354	752	55%
NWU	3690	950	25%
RU	122	28	22%
SUN	983	544	46%
TUT	2448	550	22%
UCT	134	75	27%
UFH	1281	546	42%
UFS	2690	686	25%
UJ	2473	562	22%
UKZN	3486	860	24%
UL	1590	487	30%
UNIVEN	1900	337	17%
UNIZUL	2000	1008	50%
UP	3273	627	19%
UWC	1201	520	40%
WITS	1325	543	40%
WSU	2930	558	19%
Total B.Ed	39480	11057	
Totals B.Sc, B.A., B.Comm	258		
Combined total	39738	Overall percentage awarded bursary	28%

Source: DBE, 2012b, *Funza Lushaka Report 2012*

One of the reasons for failing to meet targets is when students decline to accept the bursary. Monitoring reports up to 2012 do not specify reasons why awarded students decline bursaries although they highlight that this is a challenge.

Although Funza is funding a good proportion of students studying for their initial teacher education qualification, there are challenges with the transfer of Funza Lushaka funds from National Treasury to universities. Funds are transferred in April each year, and this creates a mismatch between an academic year and a financial year. The academic year starts in February, and funds are only available in the second quarter of the academic year. This also creates the problem of late notification of successful bursars, and creates a burden for bursars who rely solely on bursary funding as most institutions demand upfront payment for registration fees. An exceptional challenge experienced in 2011 was that there was a dip in the level of funding available due to an inflation related adjustment by National Treasury (about 5%) whilst fees at most institutions increased by more than 10%. As a result, the number of bursaries awarded dropped by about 20% compared to 2010, and many students who met criteria could not be funded (DBE, 2011b).

Monitoring and tracking systems for bursary recipients

There are several ways in which monitoring information is collected and managed. The DBE developed a report template that was sent to all participating institutions, to provide information required by DBE by a set date, for compiling implementation monitoring reports. Additional data is sourced from the State Information and Technology Agency (SITA)'s information management system as well as supply and demand data from DHET. Starting from 2013, institutions are obligated to submit the academic results of bursary recipients, providing the following information about the students: pass; conditional pass; fail; cancelled course registration; graduated; or reregistered for 2013. This information was required for 2012 bursars and it is useful for informing the confirmation of the re-award of bursaries based on FLBP policy guidelines. The monitoring of academic performance ensures that the bursaries are allocated to candidates who are progressing with their studies. In 2012, university reports on student academic performance indicated that of the students being funded through Funza Lushaka, the rate of drop out was very low at 2.4% as highlighted in the table below.

Table 19: Academic progress of 2012 bursars

Classification	Number	%
Number who qualified	2978	26.1%
Number who registered in 2012	8159	71.5%
Number who did not re-register in 2013	279	2.4%
Total	11415	

Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

Of the 279 students who were supposed to reregister in 2013 but did not do so, cancellation of courses and failure were the most prevalent reasons as outlined below.

Table 20: Academic record of 2012 bursars who did not re-register in 2013

2012 academic results	Number
Failed the year of study	65
Course cancelled	69
No results available*	47
Passed	54
Conditional pass	4
Total	279

Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

The placement of candidates to teach at a public school after the completion of their studies is essential. Information from PERSAL is used to determine the number of Funza Lushaka bursary recipients employed in public schools. This information may soon be supplemented by SARS data, to allow the programme to track recipients employed in private schools, in SGB-funded posts in public schools and indeed in other sectors. A final monitoring system comprises defaulter management where students who opt to defer their service obligation are handed over to NSFAS as the programme administrators to recover bursary funds.

There are several difficulties that make the tracking of students challenging:

- *Students change courses or de-register for priority area modules after the bursary was awarded;*
- *Students do not come forward to sign agreement forms once selected or decline a bursary after it was awarded, hence create a need to go through selection processes which cause delays in notifying additional students;*
- *Placement of qualifying bursars – Students refuse to sign placement request forms to facilitate placement in public schools, and some students have not been offered teaching posts by PDEs; and*
- *Students who enroll for Bachelors degrees do not want to enroll for the PGCE immediately after completing a Bachelors degree and opt for Honours degrees in contrast to bursary agreement conditions (DBE, 2011b).*
- The Funza Lushaka Information Management System (FLIMS), written by the State Information Technology Agency (SITA, was introduced in 2008. The program is unstable and unreliable, and records get lost, compromising the credibility of the data (DBE, FL 2014c).

Graduation and placement

Before students graduate, Funza Lushaka bursary recipients are required to submit forms indicating their provincial preference for placement as a teacher, and once graduated they are required to

report their graduation to the provincial department concerned within 14 days. Once this happens, the system (PEDs and the DBE) have 60 days to place the student in a teaching post. Should their province of first choice be unable to place them, the information will be centrally collated at the DBE and other provinces will be requested to look for placement. If, after 60 days, a graduate has not been placed in a teaching post; they are released from their obligations to repay the bursary (DBE, 2012b).

An education system with temporary and unqualified teachers is likely to produce poor results. Consequently, it is important to place qualified Funza Lushaka bursars, not only to improve the quality of education of learners, but also to extract value from the programme, by utilizing these teachers to impact schooling.

A condition of the Funza Lushaka bursary is that all beneficiaries must teach in a public school. There is some dissonance between two policy documents, with regards to placement. The document “Placement process for Funza Lushaka Graduates” indicates that students can choose a preferred province to teach in, but if they can’t be placed there, they must accept wherever they have been placed. On the other hand, the “Funza Lushaka Bursary Agreement” document specifies in bold that **Bursars cannot choose where they will be placed**. While it is worth resolving this policy ambiguity, the issue that it raises is that of supply and demand. Bursars will be placed where there is a need, and in some instances, where there is a need is not where they prefer.

Notwithstanding this lack of policy clarity, the Funza Lushaka programme has developed varied provincial placement protocols for placing of Funza graduates. Reports from provinces show that a majority of qualified bursars are placed in schools within the same year. In 2012, only 23% of the 3064 qualified bursars available for placement had not been placed in provincial posts by the end of June 2012. Table 21 shows placement of students in the various provinces. The figures reflect students who chose to be placed in that province.

Table 21: Provincial placement of Funza Bursars

Provincial Education Department	Placed	Not yet placed
Eastern Cape	47	216
Free State	150	6
Gauteng	402	55
KwaZulu Natal	922	124
Limpopo	193	15
Mpumalanga	109	12
Northern Cape	90	0
North West	91	0
Western Cape	348	284
National	2352	712

Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

The Eastern Cape seemed to be struggling the most with placement of graduates, and figures for non-placement in the Western Cape and KwaZulu Natal are also quite high. The Northern Cape, the North West seemed to be the most efficient, with Western Cape and KwaZulu Natal placement also very high. Persal data shows that most teachers were under temporary employment – which is unsurprising given the earlier observation that Persal takes quite a while to record teachers from a temporary to a permanent position (DBE internal report, 2009).

It is also important to note that the placement of students in provinces is based on each individual province’s placement policies, as outlined in Table 22 below. Most provinces seem to prioritize placement of Funza graduates. No data was available for the Eastern Cape. Western Cape information is excluded as it is not clear from the description in the DBE report (2014c) what the position is with Funza graduates.

Table 22: Provincial placement policies

Province	Description of placement policy
KwaZulu Natal	<ul style="list-style-type: none"> • Educators declared in excess are first priority for placement, followed by Funza graduates. • After all teachers in excess have been placed, any vacancies are sent to the Head Office which compiles a composite vacancy List. The matching and placing of Funza graduates is effected by the District Task Team which includes the union. Allocation of posts is on a first come first served for districts. Placements are forwarded to Head Office to process appointments letters - only the Head Office is allowed to appoint Funza bursars and issue letters to avoid nepotism and corruption. After this initial placement, Head Office requests vacancies daily from districts to place available bursars.
Mpumalanga	<ul style="list-style-type: none"> • Comprehensive lists of bursars are provided to all District Offices and Circuit offices. • These lists were distributed to schools in October 2012 after the 2013 post provisioning was released. • Schools identify bursars who meet the requirements of the vacant post at te school and appoint bursars accordingly. • At the same time, bursars can submit a complete CV to schools and Circuit Offices for possible placements. • Updated lists were constantly distributed after the results were received and bursars who had already been appointed and those who could not be placed were removed from the list .

Gauteng	<ul style="list-style-type: none"> • Bursars were required to apply for vacancies at schools through the Vacancy Circular 09 of 2012 published in January 2013. • GDE announced that for all vacancy lists preference must be given to Funza graduates and other bursary holders. • Graduates were: placed temporarily into vacant ad hoc posts and permanently into substantive posts during the first term. • Graduates were placed into profiled posts with due consideration to curriculum needs and educator qualifications. • Graduates were placed in vacant posts against promotional posts or any other resultant posts due to attrition.
Free State	<ul style="list-style-type: none"> • Head office receives lists of vacancies from schools and assessment of vacancies that can match the profiles of bursars is done. • Vacancies are matched with profiles of bursars at HR Head Office, and matched lists are sent to schools. • Schools conducts interviews with Funza bursars for possible placement, and submit recommendation forms to HR official signed by all stakeholders • HR sends appointment letters to bursars – indicating that their appointments are subject to passing their qualification (must be qualified educators). • Appointments are done on PERSAL upon confirmation of the results has been received. • Academic results are made available by tertiary institutions on request by HR if qualifications are obtained as graduation ceremony takes place in March/April 2014. • The above process is repeated in the 2nd quarter if profiles do not match existing vacancies. In this regard, bursars are placed throughout the year.
Northern Cape	<ul style="list-style-type: none"> • The province has a list of substitute posts as by 1st December of each year • Funza graduates are matched with provincial substitute posts. • SGBs are consulted and offers of employment are confirmed. • NCDoe make offers of employment to successfully matched FL graduates • A list of bursars who decline the post is sent through to DBE to follow up with regard to conversion of bursary to loans. • Students are contacted to ensure that they are in the posts in which they

	<p>have been placed and a summary is made of teachers who are placed in temporary posts.</p>
North West	<ul style="list-style-type: none"> • Vacancies in the province are analysed and matched to the Funza graduate profiles at Head Office. • Meetings are held with districts to discuss the provincial database and the temporary educator issue to prepare for the Funza intake for 2013. • District placement teams are formed. • There is initial placement of students in the Funza B Ed followed by placement of the bursars with PGCE. • Schedules, documentation, and recommendation of successful candidates are submitted to area project Offices for verification and certification. • There is continuous monitoring of the process and placement of those who cannot be placed when placement takes place initially. • The final placement list is submitted to DBE.

Source: DBE, 2014c, *Report on Funza Lushaka Bursary programme 2013*

References

For a full list of references, see the full FLBP implementation evaluation report

Annexure B: Programme Theory and Logframe

Introduction

This document describes the programme theory and presents a logframe for the Funza Lushaka Bursary Programme (FLBP). It was submitted as part of the formal requirements for the implementation evaluation of the FLBP. The programme theory and logframe were developed via a rigorous and participatory process. The evaluation team undertook a literature review which included an international review of local and international bursary programmes, reviewed FLBP documents and conducted interviews with key personnel who were involved in conceptualizing and designing the programme and its subsequent development and evolution. This led to the development of a draft programme and logframe. A two-day stakeholder workshop was then held (August 19/20 2014) with a broad range of stakeholders involved in the FLBP, to clarify the goal and objectives of the programme, identify major events in the development and evolution of the FLBP, understand how the key business processes work and confirm key components of the logframe (i.e. activities, outputs, outcomes and assumptions). Following the stakeholder workshop, the evaluation team refined the programme theory and logframe following to comply with best practices and international standards. The document was also updated at the end of the evaluation, in light of the evaluation findings and recommended improvements to the programme design.

This document is structured as follows:

- **Section 1** explains the **need** for the FLBP and briefly describes the **policy** and **institutional** context;
- **Section 2** describes the **programme design**, including changes made to the programme design since inception to date. It also summarises the **key stakeholders** involved in programme and presents the **purpose, goal and objectives** which the programme was evaluated against;
- **Section 3** presents the **theory of change** (ToC) which underpins the FLBP and outlines the **key business processes** and a summary **logframe** for the programme.

This document should serve as a living document which is reviewed and revised regularly (i.e. annually) by the Department of Basic Education (DBE), and used to guide FLBP implementers, managers and evaluators evaluating the programme in future.

It is important to note that the design of the FLBP has evolved since its inception in 2007. This document captures those changes (in Section 2.1). The implementation evaluation of the FLBP conducted by JET covers the period (2007 – 2012), it is important to bear in mind the original design and objectives which were set for the FLBP when it was conceptualized and which guided it up until 2012 and measure the performance of the programme in relation to these. Recommendations from the evaluation team regarding how the programme purpose, goal and objectives should be amended, in light of the evaluation findings are presented in Section 2.3. The ToC and logframe which are outlined in Section 3 describes the programme in its current form (when the evaluation was conducted in 2014) and recommendations for how it should be implemented going forward.

Section 1: The need for the FLBP

1.1 Rationale for the FLBP

This sub-section describes a range of issues which gave rise to the FLBP. The FLBP was conceptualised in response to an analysis of contextual factors within the education sector, which included the following:

- **Teacher supply and demand**

In 2004/2005, Government conducted an analysis of teacher **supply and demand** and identified a major supply crisis. An insufficient number of teachers were being produced and the number of trainee teacher graduates was lower than the teacher attrition rate (ToC Interviews 3 and 5, 2014).

Teacher supply is influenced by the number of students enrolling in teacher education programmes, the number of teacher education graduates, the number of graduates in specific subject areas, and the number of teachers who exit the system annually. Supply side issues include recruitment of people to train as teachers, access to financial assistance to complete studies, subject specialisation, completion rates, the proportion of teacher education graduates who go into the teaching profession, the placement of qualified teachers and teacher provisioning.

Research studies point to a shortfall in the number of new teachers being produced in South Africa. The DHET's own analysis identified that at least 12,000 new teachers are needed per annum, but the 21 public higher education institutions (HEIs) involved in initial teacher education⁷ produced approximately 6000 graduates per year. A target of 12,000 new teachers produced annually by 2014 was set for both Ministers Motshengka and Nzimande in their Delivery Agreements (DBE & DHET, 2011). This scenario is changing however, there were 13,000 new teacher education graduates in 2013 (ToC interview 2). There has been a "dramatic increase" in the supply of teachers in recent years, which the FLBP is said to have contributed towards (ToC interview 3). The supply problem is now more nuanced in that the shortage is of particular types of teachers rather than of teachers per se (ToC interview 4).

- **Ageing teacher population**

The teacher population is ageing. The proportion of older teachers has increased over the past 30 years and appears to be concentrated in the 45–55 year age group. A substantial proportion of the teaching workforce will therefore be eligible to retire on age grounds within the next 5–10 years (Mda and Erasmus, 2008). If an increased number of younger candidates do not enter the teaching profession and remain in it for an extended period, there will be inadequate numbers to replace those who leave the profession due to age. To avert an imminent shortage, government had to embark on a drive to interest young people into the profession. The FLBP aimed to mobilise bright

⁷ There are now 22 HEIs which offer initial teacher education. At the time of the DHET's analysis there were 21 HEIs which offered teacher education programmes.

young people who may not have thought about the teaching profession were it not for the bursary (ToC interview 6).

- **Recruitment**

It is difficult to attract new people into the teaching profession because of perceptions of low salaries. This is exacerbated by reports of ill-discipline in schools and the fact that other opportunities are more attractive than teaching (Patterson and Arends, 2009). A stakeholder involved in the conceptualisation of the FLBP explained that *“teaching simply wasn’t cutting it as an attractive field for students entering higher education. It was essential to link the FLBP to a marketing strategy to raise the profile of teaching as an attractive profession”* (interview 1). The FLBP was designed as a full-cost bursary to make it as attractive as possible to young people considering the teaching profession and to attract the best candidates (ToC interviews 4 and 5).

- **Financing teacher education**

Before 1994, teacher training was generally free, but from 1995 – 2005 – after the closure of teacher training colleges - bursaries for teacher training were largely abandoned (ToC interview 3), with some provision by Provincial Education Departments (PEDs) but no cohesive national initiative. The idea of a national system, funded through the national fiscus was thought to be a necessity (ToC interview 1).

In 2002, 110 teacher colleges were closed and/or merged into the 22 HEIs and tuition fees to study teacher education increased. The number of previously disadvantaged (particularly African) teacher students decreased, due to bursaries no longer being available and increased tuition fees (ToC interview 3, 2014). The National Student Financial Aid Scheme (NSFAS) was established in 1996 to provide funding to students from poor backgrounds and increase access to higher education. The share of NSFAS funding going to education students has remained small and actually declined from 11% in 1996 to 3.3% in 2001. Student enrolment in teacher education also declined during this period, suggesting a strong association between studying teacher education and access to funding (Patterson & Arends, 2009).

- **Scarce skills subjects**

The DHET’s latest draft list of top 100 occupations in high demand in the country identifies the following three schooling occupations (DHET, 2014):

- Foundation Phase School Teacher
- Natural Science Teacher (Grade 10-12)
- Mathematics Teacher (at primary school level)

HEIs corroborate the shortage of foundation phase teachers and emphasize absolute scarcity in foundation phase teachers who are trained to teach in an African language. More teachers who teach in African languages are needed to promote mother tongue instruction at foundation phase level (DBE & DHET, 2011), particularly in light of the DBE's Initial Introduction of African Languages policy. There is a shortage of teachers qualified and competent to teach specific subjects (mathematics, the sciences, technology and languages, arts and culture and economic and management sciences), phases (Early Childhood Development and foundation phase), languages (African languages, sign language and Braille), and to teach in Special Needs, rural and remote schools.

The teacher supply issue discussed earlier has become more nuanced, there is a shortage of teachers trained to teach specific phases and subjects (ToC interview 4). The introduction of "priority areas" has provided a mechanism to influence the supply and demand of teachers *"in this way we have some [influence] and can influence the number of Foundation Phase teachers who speak an African language"* (ToC interview 3). The bursary is also available to students who have completed a first degree in a subject other than education and to people working in other fields (e.g. sciences and accounting) who would like to retrain (ToC interview 6).

- **Shortage of teachers in rural areas**

The DBE (2012) highlights that PEDs face a challenge recruiting educators for rural schools. Rural areas are characterised by a critical shortage of qualified educators, particularly in physical science and mathematics. The supply of teachers to rural areas was said to have decreased following the closure of teacher training colleges (several of which were located in rural areas) (ToC interview 3). Morale is low because of poor conditions of service and the teaching environment in many rural schools. For these reasons, the FLBP was designed such that students are to be placed by PEDs in areas of greatest need (ToC interview 6).

1.2 Policy context

This sub-section outlines key aspects of the policy context which supported the conceptualization and subsequent evolution of the FLBP.

The FLBP's genesis can be seen in the 2007 National Policy Framework for teacher education and development which proposed a focus on teacher quantity and quality. The FLBP was put in place as a tool to assist and attract more students and a higher caliber of student into the teaching profession (ToC interview 2).

In later years (2011), the National Policy Framework was supplemented by The *Integrated Strategic Planning Framework for Teacher Education and Development in South Africa (ISPFTED) 2011–2025*, which outlines the vision for an integrated national plan for teacher development aimed at improving

the quality of teacher education, to improve the quality of teachers, teaching and learning (DBE and DHET, 2011).

Education plays a crucial role in national development, which is outlined in Chapter 9 of the National Development Plan (NDP). The NDP emphasizes that teachers – as the facilitators of education – are central to the success of the national education effort and teaching should be a valued profession (NPC, 2011: 265). Recognising the significance of education for national development, in 2010, the DBE launched Action Plan 2014, as part of the larger vision called Schooling 2025. The Schooling 2025 Plan is a strategy of the DBE to improve the schooling system in the period to 2025.

Teacher education programmes have been found to be of varying standards. Based on the Council on Higher Education (CHE, 2010) report, the revised Minimum Requirements of Teaching Qualifications (MRTEQ), aligned with the Higher Education Qualifications Framework (HEQF, 2007), provides the minimum competences required of a newly qualified teacher and provides guidance on revision of all teacher education qualifications. The MRTEQ directs HEIs to undertake better "professional screening of applicants prior to admission", to be "more selective during admissions processes" and to "give more support once students have been admitted and are in the system" (DHET 2011: 6). It further specifies that, as of July 2014, all new teacher graduates are expected to be able to teach in at least one official language *and* be partly proficient (e.g. able to converse) in "at least *one* other official language (including South African Sign Language) *other than* English or Afrikaans" (DHET 2011: 16).

1.3 Institutional context

This sub-section describes major changes in the institutional context which have influenced the FLBP. In 2009, the then Department of Education split to become the DBE and the DHET. Staff who were involved in managing and implementing the FLBP were split across the two new Department's now responsible for different aspects of the programme: DHET has oversight for post-school education and training whereas the DBE assesses teacher demand (by looking at enrolments and vacancy rates), DHET is responsible for ensuring that there is an adequate supply of teachers based on the supply and demand projections and the DBE manages and coordinates the FLBP.

The Department of Performance Monitoring and Evaluation⁸ (DPME) was established in 2010, leading to greater emphasis on evaluation and the development of national policies and frameworks for such. In the same year, the outcomes approach and 12 government-wide outcomes were approved by Cabinet. The first of the 12 outcomes is: Improved quality of basic education (DPME, 2010). A Delivery Agreement was signed in October 2010 by the Minister of Basic Education and a wide range of "delivery partners" are involved in supporting the Minister. The Outcome has a range of indicators linked to it which include increasing "the number of qualified teachers aged 30 and below entering the public services as teachers for the first time during the past year" (DBE, 2010). Delegates attending the theory of change stakeholder workshop noted that the establishment of the DPME and introduction of performance agreements has led to an increased emphasis on monitoring and

⁸ Now the Department of Planning, Monitoring and Evaluation.

accountability which ultimately led to the current evaluation of the FLBP – the first evaluation since the programme’s inception.

Section 2: Programme design, stakeholders, purpose, goal and objectives

This Section discusses the **design** of the FLBP and reflects on changes between 2007 and 2012, which is the period under review. Following this, an overview of key stakeholders involved in the programme is presented. We then outline purpose, goal and objectives of the FLBP and reflect on changes as compared to the original goals and objectives which were identified for the FLBP and outlined in the ToR for the evaluation.

2.1 Programme design

The design of the programme has several key features which are described below, along with a summary of changes to the design of the programme since 2007:

- **Education sector programme:** The FLBP aims to provide bursaries to 25% of the national Initial Teacher Education student intake (DBE, 2013). A range of stakeholders - including the DBE, the DHET, nine PEDs (including since 2012 the districts), HEIs and the NSFAS are involved - to ensure the success of the programme. An Implementation Protocol outlines the roles and responsibilities of the various stakeholders. Stakeholder relationships are reported to have been cemented over the years, with greater involvement by PEDs and Districts from 2012 with the commencement of district-based recruitment.
- **Service-linked:** Students are bound by signing an annual contract to give one year of service for each year that they receive a bursary. During the first few years, parents signed contracts on behalf of bursars, which posed a challenge. This was changed and bursars now sign contracts annually. A shift reportedly took place in 2010, from students looking for placement, to the Human Resources (HR) sections within the DBE and PEDs assisting with placement. A placement request form was introduced in 2012 for final year students to complete, indicating where they would like to be placed and, in 2013, placement applications were made available online. PEDs have 60 days in which to place FLBP graduates, or the service obligation expires. Stakeholders raised concerns during interviews and the theory of change workshop that the 60-day placement period is unrealistic.
- **Administered by NSFAS:** Funding is governed by National Treasury regulations through the NSFAS Act. Money is transferred from the DBE to NSFAS after the start of the financial year (i.e. 1 April) annually. NSFAS disburses the funds to universities and the bursaries are then administered through the Financial Aid Office (FAO) at universities.

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- **Full-cost annual bursary scheme:** The FLBP aims to provide a full-cost bursary that is as attractive as possible to young people. The bursary is intended to cover registration fees, tuition fees, an allowance for books, travel and residence fees or approved accommodation and meal costs. Bursaries support students enrolled in a one year Post Graduate Certificate in Education (PGCE), three year Bachelor of Arts (BA) or Bachelor of Science (BSc) degree plus a one-year PGCE, or a four year Bachelor of Education (BEd), either from the start of their studies, or for students already enrolled who apply part-way through their studies. The amount provided to students differs depending on the HEI they attend.
 - **Targeted within the context of educational needs:** Based on priority needs identified in 2006 (Department of Education, 2006), FLBP recipients should be selected contingent on their studying in priority areas that include Mathematics, Science, African Languages, English Language⁹ (all phases), Intermediate/Senior Phase Technology, FET Technology subjects (including ICT, and the Foundation Phase (with special emphasis on students who can teach in an African Language). In the early years the focus on priority areas was not emphasized, as the main aim was to increase enrolment in teacher education programmes and thus enhance teacher supply. There has been a greater focus in more recent years on selecting teachers based on needs, as enrolment in teacher education programmes has increased. The priority areas were revised in 2009 and 2012, with the need identified to place emphasis on first language African language-speaking teachers, due to shortages, particularly in Foundation Phase. This led to ring-fencing a certain number of bursaries for Foundation Phase first language African-language speaking students at some HEIs. District-based recruitment introduced in 2012 emphasized recruitment from specific geographic (rural) areas, based on the assumption that they would return from the areas they came from to teach and thus increase the supply of qualified teachers. The need was identified by several interviewees and stakeholders attending the workshop to tighten and strengthen the recruitment of graduate teachers to geographic areas of need.
 - **Merit-based bursary:** FLBP bursars are selected based on academic performance, to make selection competitive and attract the highest calibre of students. A number of stakeholders who were interviewed and several who attended the workshop stressed the importance of selecting students who have a passion for teaching and demonstrate the potential to be a good teacher. This may alter the design of the programme, by expanding the selection criteria, as the programme looks forward.
 - **Pro-poor:** In 2007 recruitment was paper based and in subsequent years it was solely via an online application system. In 2012 a mechanism was put in place to enhance the recruitment of candidates from rural areas (specific districts) who are from disadvantaged backgrounds. District-based recruitment was introduced in 2012; in this year 2,000 bursaries were reserved for students coming from Quintile 1-3 schools to give the bursary a definite pro-poor focus.

⁹ English language was a priority subject for many years, but is no longer a priority for the Foundation Phase.

The idea was to recruit students from districts with shortages of qualified teachers, who would go back to those districts to teach after graduation. Since then district-based recruitment has taken place alongside the regular online application system. District-based recruitment increased the role of PEDs and districts, who actively recruit by going into schools. In 2013 community-based recruitment was piloted in Gauteng. The FLBP continues to be a merit bursary, awarded to applicants with the highest academic achievement. The district-based recruitment mechanism ring-fences bursaries for students from Quintile 1-3 schools to ensure that students compete for the bursary against peers who attended a similar school.

2.2 Programme stakeholders

A range of stakeholders play critical roles in the FLBP. Their roles and functions are defined in the FLBP Implementation Protocol. The following table identifies the key stakeholders and summarises their role in the FLBP.

Table 1: Stakeholders key to the FLBP and their roles

Key stakeholders	Their role
HEIs	Responsible for selection in collaboration with the province and the DBE. Responsible to inform successful applicants and gather documentation for NSFAS. Provide teaching and support of teacher students, along with payments to them. HEIs also check and confirm placement request forms.
NSFAS	Sign contracts with FLBP bursars. Manage the FLBP funds. Process payments to HEIs, receive statements of account from HEIs and submit audited financial statements.
PEDs	Responsible for supporting districts with recruitment. Responsible for establishing the district-based selection panel and selecting awardees, together with Districts, the DBE and HEIs. Participate in HEI selection. Responsible for the placement of FLBP graduates
DBE	Responsible for recruitment campaigns. Responsible for identifying the criteria to be applied for selection and participating in selection. Make awards and inform HEIs of final list. Capture and communicate placement information.
State Information Technology Agency (SITA)	Responsible for developing the FLBP Management Information System (MIS).
Districts	Responsible for District-based recruitment and ensuring district-based bursars apply to HEIs. Participate in selection of district-based awardees.
Bursars	Obligated to provide one years teaching service for every year that they receive a FLBP bursary, or repay the bursary (as a loan).

2.3 Programme purpose, goal and objectives

The **purpose** of the FLBP was confirmed by key programme stakeholders as being:

“To address educator scarcity in priority areas (scarce skills subjects and geographically identified areas of need) so as to respond to concerns about teacher supply and demand and the need to increase the number of appropriately qualified teachers placed in priority areas in geographical areas of need in South Africa”.

The programme purpose above holds the same characteristics as the purpose defined in the ToRs provided for the evaluation¹⁰. The wording was revised based on inputs at the stakeholder workshop. ‘High quality teachers’ was replaced with ‘appropriately qualified teachers’, since the FLBP has no direct control over the quality of initial teacher education and stakeholders attending the workshop noted that the term ‘high quality’ was therefore problematic.

The **goal** of the FLBP is:

“To contribute to the supply of qualified teachers in priority subjects, phases and identified geographical areas, through attracting suitable students and ensuring they are appropriately trained in regularly defined priority areas (scarce skills subjects)”.

The goal statement was re-worded in line with the EU Guide to Logical Framework Development (European Integration Office, 2011), which sets out good practices in structuring programme goals. The programme goal above holds the same characteristics as the two goals defined in the evaluation terms of reference¹¹, with slight amendments as summarized below:

- Stakeholders recommended including the need for priority areas to be defined regularly – this wording has been added to the programme goal;
- ‘Quality students’ and ‘adequately trained’ were replaced with ‘suitable students’ and ‘appropriately training’; and
- Stakeholders noted that teachers are not just needed in rural and poor schools, hence the wording ‘rural and poor schools’ has been replaced with ‘identified geographical areas’

Subsequent to the evaluation, the evaluation team recommend that the programme purpose and goal be subsumed into one statement¹² as follows:

¹⁰ “The purpose of the FLBP is to ensure that the basic education sector responds adequately to the supply and demand needs for high quality teachers in nationally-defined priority areas” (DBE and DPME, 2014)

¹¹ “1. To attract quality students; and ensure that students are trained in identified priority areas. 2. To contribute substantially to the supply of adequately trained teachers with a focus on rural and poor schools.”

¹² There is no “standard format” for programme theory. According to Wildschut, a South African expert with a PhD on the topic of programme theory, programme theory frameworks contain the following components as standard – inputs,

“To address educator scarcity and contribute to the supply of qualified teachers in priority phases and subjects, targeting geographical areas of need in South Africa”

Three **objectives** were identified by the evaluation team and confirmed at the stakeholder workshop. These are outlined in the box below.

Objective 1: To attract academically deserving suitable* South African students to become teachers in identified priority areas (scarce skills subjects and phases and identified geographic areas).

***suitable defined as** ‘having a passion for teaching, teaching ability and desire to teach in priority subjects, phases and identified areas’

Objective 2: To ensure a satisfactory completion rate of funded students in identified priority areas (scarce skills subjects and phases).

Objective 3: To effectively place FLBP graduates in schools identified as under-resourced.

The programme objectives formulated by the evaluation team differ to the five objectives¹³ defined in ToR provided for the Evaluation. The original objectives are presented below, with a discussion on what has been removed and changed and why:

- *To employ efficient and effective recruitment mechanisms to attract quality students (aged 30 and below) to become teachers in identified priority areas.*
Stakeholders indicated that ‘aged 30 and below’ has not been strictly adhered to, because, although the FLBP focuses on attracting youth, a number of older teacher education students have been funded, including unqualified teachers and people who are retraining for a different career. Key to this objective is the wording ‘to attract’, which is included in the revised Objective 1.
- *To increase the number of first-time enrolments by 10% year on year.*

activities, outputs and outcomes (CREST, 2016). We have opted to follow the template provided by the DPME which also includes the goal and objectives.

¹³ 1. *To employ efficient and effective recruitment mechanisms to attract quality students (aged 30 and below) to become teachers in identified priority areas;* 2. *To increase the number of first-time enrolments by 10% year-on-year;* 3. *To provide financial assistance to South African youth with academic potential to enter and complete tertiary studies in teacher education programmes;* 4. *To ensure a satisfactory completion rate of funded students;* 5. *To ensure that Funza Lushaka graduates are placed appropriately in schools.*

Stakeholders commented that this objective may no longer be relevant or achievable through the FLBP alone. The number of first-time teacher education enrolments has increased, reportedly due to number of factors, increasing enrolment is no longer a primary concern of the FLBP and the FLBP is not the only funding mechanism available to support teacher education students. There has been a steep rise in tuition fees at HEIs without a similar increase in the total funding provided by National Treasury for the FLBP year on year, which means that the total number of students funded by the FLBP cannot increase at 10% per year. There are a significant number of returning students who have previously been funded via the FLBP and require funding in subsequent years, so a percentage increase of first time enrolments is not achievable every year. This objective does not describe how the education sector will be changed through results and the evaluation team recommends that it be omitted as an objective of the FLBP.

- *To provide financial assistance to SA youth with academic potential to enter and complete tertiary studies in teacher education programmes.*
The evaluation team proposes that this objective be combined with the subsequent objective as part of a revised Objective 2. The objective refers to provision of funding for students and their completion of studies in teacher education programmes. The evaluators do not believe there is need for an objective that specifies the provision of financial assistance to SA youth, because the programme purpose is to address educator scarcity and enhance teacher supply rather than provide bursaries to deserving youth, and bursaries are provided to non-youth as well. Funding is one mechanism to support students complete their studies and this is referred to in revised Objective 2. The wording 'academic potential' has been included in a revised form ('academically deserving suitable students') as part of revised Objective 1.
- *To ensure a satisfactory completion rate of funded students.*
This objective is captured as revised Objective 2, which is expanded on further to specify 'identified priority areas (scarce skills subjects and phases and identified geographic areas)'.
- *To ensure that FL graduates are placed appropriately in schools.*
This objective is captured as revised Objective 3, it has been expanded further to indicate placement in schools identified as under-resourced.

Subsequent to the evaluation, the evaluation team recommend that the programme objectives be rephrased as follows¹⁴:

1. To provide bursaries which attract academically deserving and financially needy students, with a passion for teaching and the potential to become good teachers, into teacher education programmes, specialising in priority phases and subjects.
2. To provide financial support to FL bursars to complete their studies – where possible in the minimum time – and graduate specialising in priority phases and subjects.
3. To match FLBP graduates with vacancies aligned to their phase and subject specialisations in schools with shortages of qualified teachers.
4. To track FLBP bursars, to ensure that they fulfil their service commitments and monitor their performance over time.

Section 3: Theory of change, Key Business Processes and logframe

This Section describes the core of the FLBP. Sub-section 1 outlines the ToC which the FLBP is based on, sub-section 2 lays out the Key Business Processes, and sub-section 3 presents the logframe which summarises the FLBP.

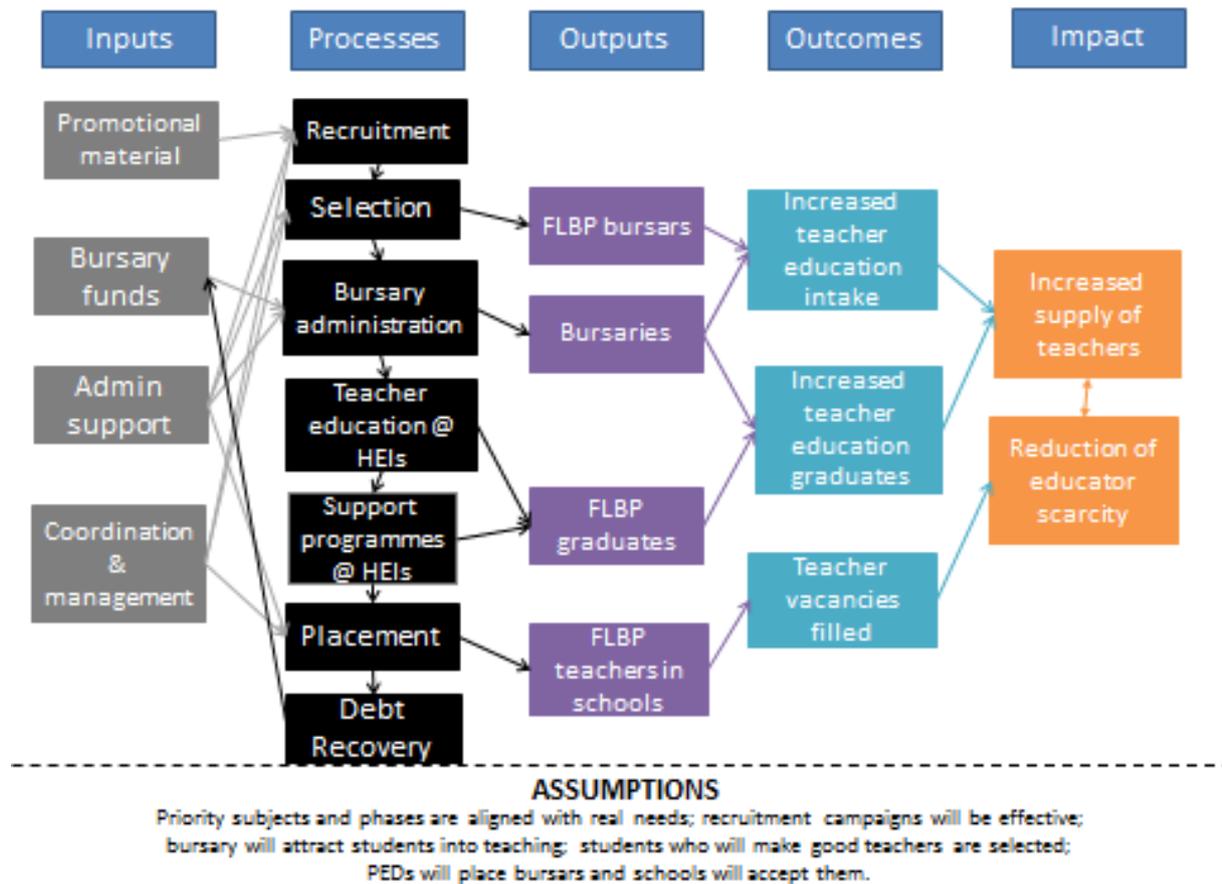
3.1 Theory of change

The following theory of change statement is proposed for the FLBP and elaborated further below:

If you provide a sufficient full-cost bursary as an incentive to recruit students for initial teacher education, and you select teacher students based on merit (academic performance) and suitability (passion for teaching, teaching ability and desire to teach in priority subjects, phases and identified areas), and then you develop induction and academic support programmes and tracking systems to ensure satisfactory completion of funded students, and you link bursaries to service contracts and place FL graduates in posts where they will be teaching priority subjects and phases in identified geographical areas of need, then you should be able to increase the supply of qualified teachers to meet the need in priority areas (subjects, phases and identified geographical areas of need) so as to address educator scarcity.

¹⁴ The rationale for including another objective is that tracking and monitor bursars is essential to ensure the cost effectiveness of the programme and for future evaluative work. Not having a system in place currently meant that the evaluation team were unable to assess the extent to which bursars were fulfilling the service agreement linked to their bursaries.

Figure 1: FLBP programme theory



Rossi, Lipsey and Freeman (2004) distinguish between programme impact and programme process theory. Programme impact theory describes a ‘cause-and-effect sequence’ from activities to outcomes and impact whereas programme process theory describes how a programme is organized, and administered. Both components are described below as well as the assumptions which underpin the impact and process theory.

In order to attract academically deserving and suitable South African students into teacher education, the DBE, PEDs and education districts undertake national and district-based recruitment campaigns. Promotional material is developed by the DBE. The DBE promotes the FLBP at a national-level. District-based recruitment campaigns target schools in districts where there are teacher shortages (based on the assumption that students recruited from there will be willing to go back there to teach). The success of the district-based recruitment campaign relies upon PEDs, districts and school principals cooperating in the promotion and marketing of the FLBP. The campaigns target young people with a good academic background, who demonstrate a passion for teaching, and who are willing to study identified priority subjects and be placed in areas of need. An underlying assumption is that the bursary – which covers all academic-related costs - will be attractive to students who will want to apply to study teacher education.

Potential students apply online, or, in the case of district-based recruitment, paper-based application forms are returned to district offices and captured by districts, supported by PEDs (to remove the barrier of requiring a computer and internet access to apply). Selection committees are then convened to select FLBP bursars. District-based applicants are selected at provincial level by a selection committee comprising PEDs, HEIs, districts and the DBE. National/general applicants are selected by a selection committee at the HEI they have applied to, after the district-based recruitment and re-awards have been made and the HEI knows how many bursaries are available. The number of new national/general awards depends on the funding available, the number of district-based re-awards and the estimated cost of academic-related costs at the HEI. The HEIs establish selection committees comprising PEDs, the DBE and HEI stakeholders.

$\text{Number of new awards} = \frac{\text{(funding available)}}{\text{(estimated cost of academic-related costs)}} - (\text{re-awards} + \text{district-based awards})$
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The FLBP selection criteria are applied to identify the most suitable candidates. Underlying assumptions are that a sufficient number of appropriate candidates will apply, stakeholders will be willing to participate in the selection committees, the selection committees will apply the FLBP criteria when making selections, the FLBP criteria are adequate to guide selection¹⁵, and sufficient funds are available to make new awards (taking into consideration the estimated cost of tuition fees and education-related expenses).

For district-based selection, the best candidates are selected out of the applicants from quintile 1 to 3 schools in the targets districts. Approved candidates receive a promissory letter from the DBE which indicates that they have been pre-approved for a Funza Lushaka bursary. Students who received the Funza Lushaka bursary in the previous year and have a further year(s) of study usually receive a re-award. They apply online and their HEI recommends them for re-award based on their performance during the previous academic year. For HEI-based selection, the best candidates are selected out of the applicants to a particular HEI. Approved candidates will be notified when the academic year is underway. Underlying assumptions are that approved candidates will accept the Funza Lushaka bursary and be willing to sign a contract with the DBE which commits them to provide one year of teaching service for every year which they receive a bursary for, and will be able to survive financially (with or without support from the HEI) until the bursary is paid out (after 1 April in the new financial year).

Once Funza Lushaka bursars commence with teacher education programmes, responsibility falls upon the HEI to monitor and support students to complete their studies. HEIs establish tracking

¹⁵ Some stakeholders attending the workshop expressed a concern that the current FLBP selection criteria are not adequate as they do not include a means or measure for assessing candidates' passion and suitability for teaching. A psychometric test or screening process where candidates are asked to explain their motivation was suggested.

systems to monitor students¹⁶ academic performance and identify students in need of additional academic support to pass and complete their programmes. Underpinning assumptions are that HEIs have the capacity and willingness to monitor students' academic performance and provide support where necessary. HEIs offer academic support programmes for identified students, assumptions linked to this are that students will be willing to attend support sessions and that the support programmes will be well-designed, so that they will assist students that attend to perform better. Support programmes are not be specific to Funza Lushaka bursars but are for all teacher education students. HEIs monitoring and tracking systems should also be able to identify when students change their subjects and – importantly for the FLBP – when Funza Lushaka bursars switch majors such that they are no longer specializing in priority subjects and phases (which are a criteria for receiving the bursary). The DBE should be informed if/when FL bursars switch to subjects and phases which are not FLBP priorities so that these students can be informed that if they decide to switch then they will no longer be eligible to receive a bursary and it will be converted to a loan.

Provided Funza Lushaka bursars receive sufficient academic support (from the HEI) and financial support (in the form of a full-cost bursary) they will complete their studies and qualify as a teacher specializing in a subject/phase aligned with the FLBP priorities. Underlying assumptions are that the bursary allocation is adequate to meet bursars' education-related needs whilst they are studying and that the FLBP priority subjects and phases are aligned with actual, real identified needs¹⁷.

In their final year of studies, students that have received the Funza Lushaka bursary for at least one year complete 'placement forms' which detail the subjects and phases they have specialized in and the area (province and district) which they would prefer to be placed in. The DBE compiles a consolidated list and communicates with PEDs regarding the Funza Lushaka bursars who will be available for placement. PEDs undertake an audit of teacher vacancies and teacher needs and match their needs with the list of bursars available for placement. PEDs communicate with the DBE regarding bursars who would like to be placed in their province, but whom they cannot place, and the DBE compiles a consolidated list of 'unplaced bursars' which it circulates to the PEDs who then have the option to offer a teaching placement to suitable candidates. Underlying assumptions are that the FLBP has accurate information about when Funza Lushaka bursars will graduate, students complete and return the placement forms timeously, students provide accurate information on their placement forms (about subject and phase specialities and extra curricula interests), Funza Lushaka bursars will pass their final year and graduate when expected, PEDs undertake teacher vacancy and needs audits annually, schools provide accurate information to PEDs, the DBE and PEDs communicate effectively regarding the placement of bursars.

Funza Lushaka bursars should be placed within 60 days. If the DBE/PEDs cannot place students within 60 days then their obligation to give one years teaching service for every year that they received a

¹⁶ This applies to all students not just Funza Lushaka bursars.

¹⁷ A number of high-level stakeholders that were interviewed to inform the development of the FLBP theory of change expressed a concern that there is inadequate data available on teacher requirements (e.g. by phase, subject and geographic area) and this has constrained the ability of the FLBP to address real needs.

bursary falls away. If students decline a placement then the bursary should be converted into a loan which must be paid back with interest. Assumptions which underpin this are that it is possible/feasible to place students within 60 days (the PEDs are willing to place Funza Lushaka graduates and schools will accept them), that the DBE has the capacity to monitor placement and non-placement, that a mechanism exists to convert bursaries into loans¹⁸ if bursars break the service conditions and that NSFAS has the capacity to recover bursaries which are converted into loans.

Intermediate outcomes which result from the FLBP theory of change are that: the bursary provides an incentive that increases the intake of quality teacher education students (assumptions are that students who would not study teacher education without the bursary are attracted into teacher education programmes and that these students are of good quality). Similarly, the placement of Funza Lushaka bursars specializing in priority subjects/phases in identified geographic areas of need will lead to a reduction in teacher vacancies (specifically in priority subjects/phases). Assumptions underpinning this are that there is a shortage of teachers, that there is alignment between the FLBP priority subjects/phases and teacher needs, and that the number of new teachers entering the education system (Funza Lushaka graduates, other teacher education graduates and unemployed teachers) exceeds the number of teacher exiting the system.

Over the long-term, the FLBP will lead to an increased supply of competent teachers specializing in priority subjects/phases and in identified geographic areas, providing the HEIs teacher education programmes produce competent teachers, Funza Lushaka graduates remain in the education sector/teaching, they are allocated to and remain teaching the subjects/phases they have specialized in and they remain in identified geographic areas of need. Therefore the FLBP will contribute to addressing educator scarcity, specifically in priority subjects/phases and areas, provided that there is alignment between the country's teacher needs and the FLBP priorities and placement system.

The evaluation uncovered the following areas of weakness in the programme theory which should be addressed in terms of programmes design and implementation going forward:

- There are weaknesses in terms of marketing the programme, a considerable proportion of bursars do not hear about the programme until they commence studies. Thus the aim of attracting young people into the teaching profession – who may not otherwise have considered studying teacher education - may not be achieved.
- Monitoring of students' subject specialisations (after enrolment) and academic performance and the provision of support where relevant is undertaken by HEIs currently, but information regarding this is not fed back to the FLBP. This is a gap, such information could help to streamline selection of continuing students, ensure that bursars continue to study subjects which are “priority subjects” and assist in ensuring a satisfactory completion rate of FLBP bursars.

¹⁸ There is no mechanism currently for Funza Lushaka bursaries to be converted into loans if students break the conditions of their service contract. This is a gap which the NSFAS said it was taking steps to address.

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- The evaluation findings have demonstrated that there are weaknesses in terms of matching FLBP graduates with vacancies linked to their phase and subject specialisations. This could be the result of poor planning (priority subjects are not linked to real needs) or poor matching (graduates are not well matched with a vacancy which is aligned to their specialisations). This needs to be addressed.
 - A considerable proportion of FLBP graduates are not placed within 60 days and are thus effectively released from their teaching service obligations. The 60 day placement period and the modalities of placement should be reconsidered.

Monitoring of placement and non-placement and whether FLBP graduates fulfil their service obligations by teaching in public schools for the same number of years as they received a bursary for is not happening. Linked to this, there is no mechanism in place to convert bursaries into loans. These aspects of programme design and implementation need to be addressed as a matter of urgency. We recommend that an additional business process be designed around this.

3.2 Key Business Processes

Understanding how the FLBP's key business processes operate is critical to understanding the FLBP's process theory. Four over-arching business processes relating to the FLBP were identified and confirmed by FLBP stakeholders at the workshop. These are elaborated below:

- 1. Recruitment**
- 2. Selection**
- 3. Awarding and disbursement; and**
- 4. Placement**

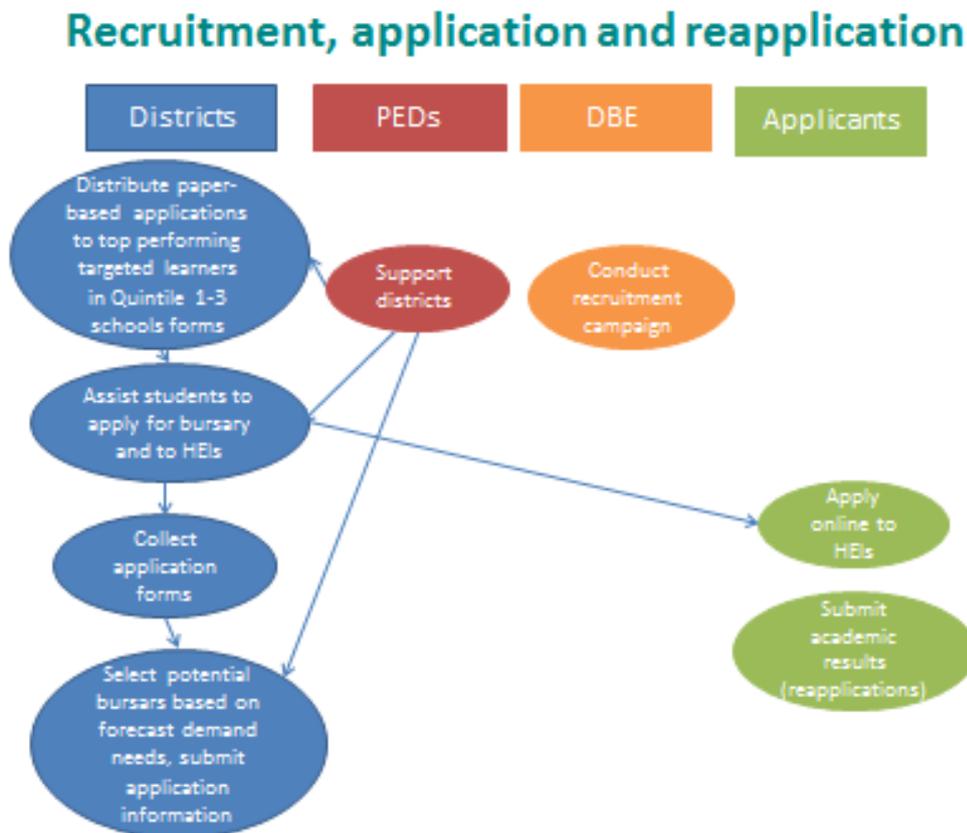
3.1.1 Recruitment

Recruitment comprises three sub-processes: **general recruitment**, **district-based recruitment** and **reapplication**.

The DBE is responsible for conducting **general recruitment** campaigns for the FLBP. Students applying via the general route apply online.

Since 2011, the PEDs support districts to recruit students using a district-based recruitment process. The **district-based recruitment** targets top performing students from Quintile 1-3 secondary schools. Districts distribute paper-based application forms to schools together with an information pamphlet (produced by the DBE). Paper-based applications remove the barrier of access to a computer and the internet, but online applications can also be made. Districts support students to complete the application forms and ensure that they apply to study teacher education at HEIs. Districts collect application forms and capture the information electronically. Districts submit applications and supporting documents to PEDs.

Figure 2: Recruitment and application process



Continuing students with at least one further year of teacher education study reapply online at their HEIs and submit their academic results (in support of their application) when these become available. The diagram below summarises the **recruitment** business process.

3.1.2 Selection

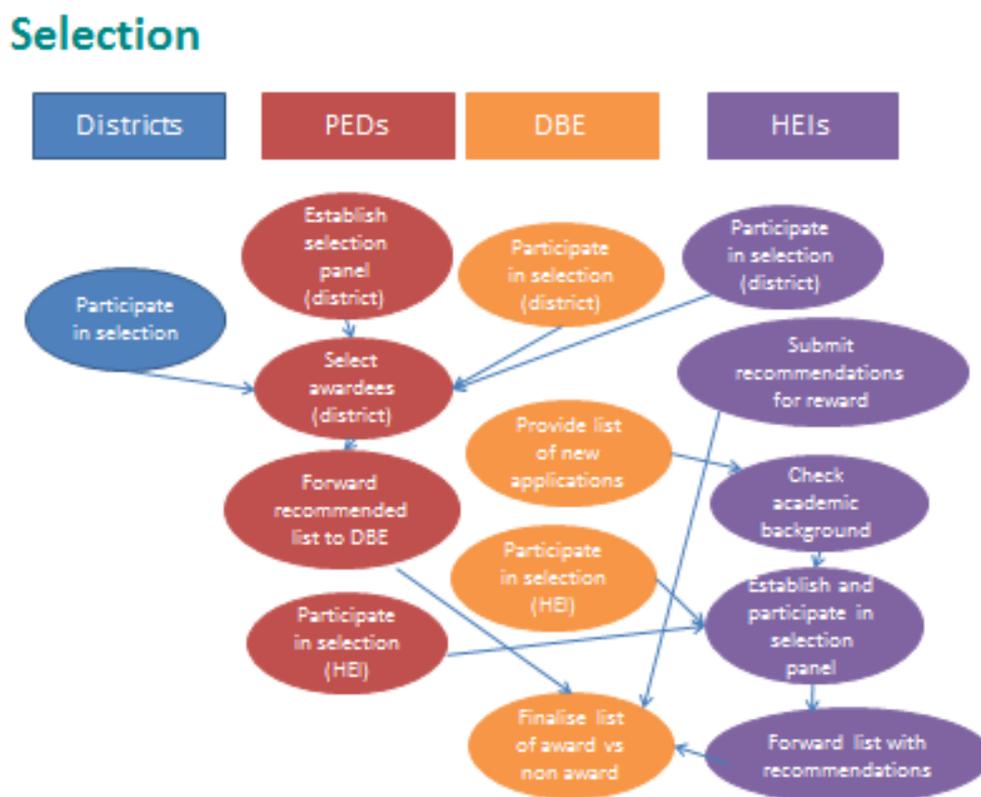
Selection comprises three sub-processes: **district-based** and **HEI-based/national** selection and **re-awards**.

District-based selection applies to students mainly from quintile 1-3 schools who have applied via the district-based recruitment process. For district-based selection, PEDs establish a selection panel - comprising the DBE, Districts, HEIs and PEDs – to select the district-based awardees. Selection is based on academic merit and the FLBP selection criteria are applied. Applicants are ranked and top achievers are recommended for award. The recommended award list is forwarded to the DBE for approval and approved students receive a promissory letter to indicate that they have been pre-approved for the Funza Lushaka bursary, pending acceptance at an HEI and satisfactory senior certificate results. The DBE provides HEIs with a list of students who have been pre-approved via the district-based selection.

HEIs recommend students for **re-award** (i.e. to receive the bursary for another year of study) based on their performance (i.e. satisfactory) during the previous academic year and the DBE approves and official list of re-awards.

For **HEI-based** selection, the HEI receives a list of new applications from the DBE to review and conducts academic background checks. HEIs establish a selection committee - comprising the Academic Coordinator, Dean, PED, DBE and FAO – and decisions are made based on the number of bursaries available (which depends on the funds available, the cost of studying education at the HEI, and the number of district-based and re-awards for the coming year). The selection panel recommends students for awards and a list is forwarded to the DBE who makes the final decision.

Figure 3: Selection business process

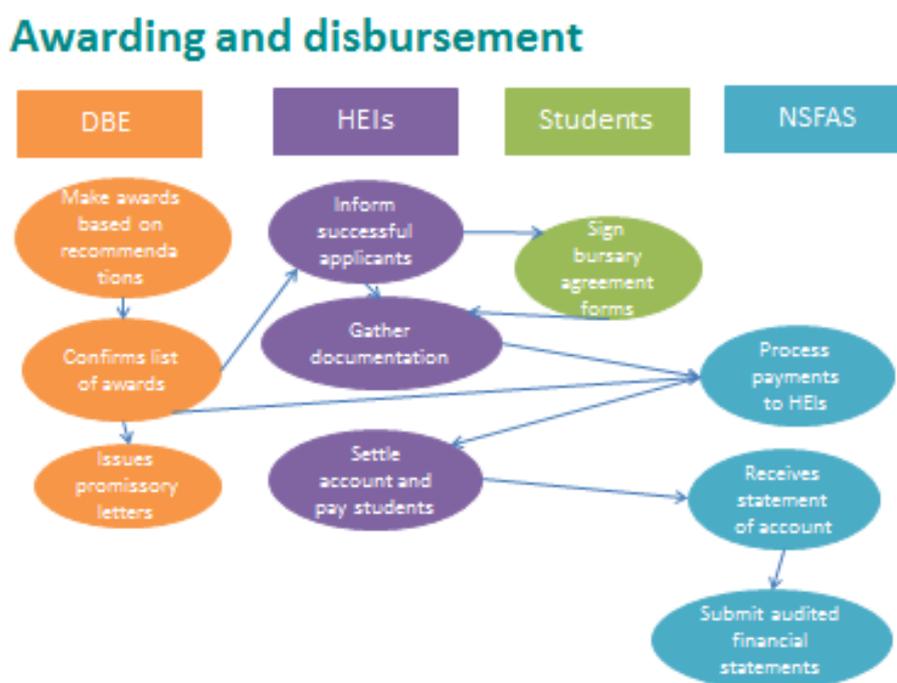


The selection business process is summarized below.

3.1.3 Awarding and disbursement

The DBE makes awards based on recommendations made by HEIs (with respect to reapplications) and the selection committees and provides HEIs and NSFAS with a confirmed list of awards. The DBE issues promissory letters to district-based awardees. HEIs inform successful students and collate documentation that is required including bursary agreement forms (which form a contract between the students and the DBE) for NSFAS to release the bursary. HEIs forward the documentation to NSFAS. The NSFAS pays the student bursaries to the HEIs who recover institutional costs (i.e. registration and tuition fees, accommodation and food if applicable) and pay the balance to students. NSFAS receives a statement of account from each HEI and submits audited financial statements to the DBE. The diagram below summarizes this business process.

Figure 4: Awarding and disbursement business process

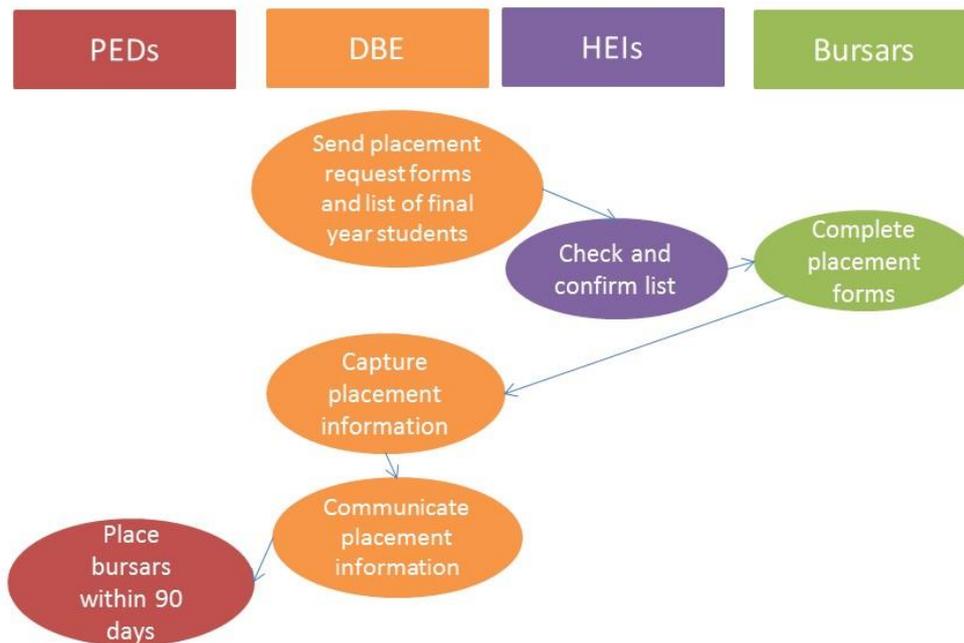


3.1.4 Placement

The **placement** business process can be summarized as follows: the DBE sends HEIs a list of Funza Lushaka bursars in their final year of study who will be eligible for placement the following year which the HEI confirms (and amends if necessary). The DBE sends placement request forms to HEIs who request students to complete them, indicating their subject and phase specialization, extra-curricular interests and preferred province of placement. Since 2013 student placement information has been submitted online. Placement information is collated by the DBE and communicated to the PEDs. PEDs are required to place bursars who want to work in their province within 60 days of receiving notification of the students' results. PEDs report monthly to the DBE on placement. If PEDs cannot place bursars, they inform the DBE and the DBE offers these bursars to other PEDs for placement. FLBP graduates not placed within 60 days are relieved of their service obligation. If students refuse to accept a teaching post then their bursary should be converted into a loan¹⁹ which they are required to pay back. The graphic below summarizes this business process.

Figure 5: Placement business process

Placement



Subsequent to the evaluation, the evaluation team recommend that the business processes be reorganised: recruitment and selection can be combined into one core business process linked to objective 1 and tracking and monitoring should be added as an core business process linked to the new objective 4 which is proposed.

¹⁹ As noted previously, the conversion of bursaries into loans is not taking place currently, but the FLBP documentation makes provision for it.

3.3 FLBP logframe

A logframe presents a summary of key components of a programme or project. A template provided by the DPME was used to compile the FLBP logframe which follows. The logframe includes the following components: goal, objectives, activities, outputs, intermediate and long-term outcomes, indicators, sources and means of verification and assumptions which underpin the links in the logframe between activities, outputs, outcomes and achievement of the goal and objectives.

The logframe which guided the evaluation is presented first. Following this, an updated logframe (which includes the new proposed objective 4) is presented, which should be used to guide planning, implementation, monitoring and evaluation going forward if the recommendations made elsewhere in this document are accepted.

Table 2: FLBP Logframe

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
FLBP goal	To contribute to the supply of qualified teachers in priority subjects, phases and identified geographical areas through attracting suitable students and ensuring they are appropriately trained in regularly defined priority areas (scarce skills subjects).	Quantifiable increase in the supply of teachers specializing in priority subjects and phases since 2008. Quantifiable increase in the supply of teachers to identified geographical areas of need since 2008. % of FLBP graduates still teaching/in the education system after five years.	Data sources: PERSAL database, FLBP management information system (MIS), DBE and PED statistics on identified teacher needs and teacher placement.	FLBP graduates are qualified to teach priority subjects and phases. FLBP graduates are placed in identified geographical areas of need. FLBP graduates are committed to staying in teaching/education. # of teachers entering the system (including FLBP graduates) is equal to or exceeds the number of teachers leaving the system each year.
Objective 1: To attract academically deserving suitable South African students to become teachers in identified priority areas (scarce skills subjects and phases and identified geographic areas).				
Long-term outcome	Increased number of teacher education students, specifically specializing in priority areas.	Quantifiable increase in teacher education enrolment since 2008, specifically specializing in priority areas.	Data sources: HEIs' MIS	HEIs have the capacity to absorb increased enrolment in teacher education programmes.
Intermediate outcome	Increased intake of suitable students specializing in priority areas into teacher education programmes.	% FL bursars specializing in priority areas. % Teacher education students specializing in priority areas.	Data sources: evaluation survey results; HEI MIS's.	Suitability is determined in terms of academic achievement, demonstrating a passion for teaching, willingness to study priority areas and be placed in areas of need; the bursary will attract students into teaching; teacher

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
				education programmes are aligned with FLBP priority areas.
Outputs	Recruitment activities conducted (national).	% implementation of annual management plan.	Data source: DBE quarterly reports.	DBE wants to market the FLBP; recruitment campaign is appropriately targeted.
	Recruitment activities conducted (district-based)	% implementation of annual management plan.	Data source: PEDs quarterly reports.	PEDs and districts want to market the FLBP; recruitment campaign is appropriately targeted.
	Applications made to FLBP.	# of applications (national and district-based) annually.	Data sources: Data source: FLBP MIS.	Applications are complete; applicants chose to specialize in FL priority areas
	FL bursaries awarded.	# of FL bursaries awarded (national, district-based and re-awards).	Data sources: Data source: FLBP MIS.	Applicants are suitable; the FLBP criteria are appropriate and enable selection committees to identify applicants who will make good bursars; bursary applicants apply and will be accepted to study teacher education; successful applicants will accept the bursary and pursue teacher education studies.
Activities	National recruitment campaigns by DBE (development of promotional material, promotion via radio and social media, roadshows and open days).	# of promotional materials developed. Annual management plan for national recruitment.	Data sources: promotional materials; DBE annual management plan.	DBE wants to market the FLBP; recruitment campaign is appropriately targeted.
	District-based recruitment campaigns (distribution of	Annual management plan for district	Data source: PEDs annual management plan.	PEDs and districts want to market the FLBP; recruitment campaign is

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
	promotional materials, talks in schools, Principals identify suitable possible candidates).	based recruitment.		appropriately targeted; Principals are willing to identify learners with the potential to become good teachers.
	South Africans apply for the FLB (online and district-based applications).	# of applications (national and district-based) annually.	Data source: FLBP MIS.	Applicants are aware of the deadlines and application procedures.
	Screening and selection of FL bursars (HEI and district-based and re-awards).	Meetings of selection committees (provincial and HEI based). List of approved FL bursars.	Data sources: meeting minutes; selection reports; approved bursar list.	Selection committees apply FLBP criteria when selecting bursars; stakeholders are able/willing to participate in selection committees.
	FL bursaries provided to SA youth who meet FL criteria in terms of merit and priority areas.	# of FL bursaries awarded (national, district-based and re-awards).	Data sources: Data source: FLBP MIS.	Sufficient funds are available to award FL bursaries.
Objective 2: To ensure a satisfactory completion rate of funded students in identified priority areas (scarce skills subjects and phases)				
Long term outcome	Improved completion rate of FL bursars (viz-a-viz other teacher education students and in comparison to previous years)	Completion rate (e.g. % of FL bursars who complete teacher education programmes in the expected time). Average number of years FL bursars take to obtain a qualification.	Data sources: HEMIS, HEIs MIS, FLBP MIS, evaluation survey.	HEMIS/HEI MIS and FLBP MIS are capable of tracking student progression and graduation.
Intermediate outcomes	Increased pass rate (year-on-year) of FL bursars (decreased number of drop-outs/under-performing students).	% of FL bursars who pass each year and receive a re-award.	Data source: HEIs year-on-year pass rates; (should be on FLBP MIS).	Academic support programmes are effective – student performance improves. HEIs are willing to provide academic performance data to the DBE.

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
	Decreased # of FL bursars changing majors to subjects not identified as priority.	# of FL bursars that change majors to subjects not identified as priority.	Data sources: HEIs monitoring and tracking system; reports submitted to the DBE.	HEIs are able and willing to provide data to the DBE on students majors and subject changes.
	FL bursars are understand and are happy/satisfied with FL conditions, processes, procedures, provisions and obligations.	<p>% of FL students who are well informed regarding FL conditions and obligations.</p> <p>% of FL students who are happy/satisfied with FL processes and procedures.</p> <p>% of FL students who state that the bursary is sufficient for education-related needs.</p>	Data source: evaluation survey findings.	<p>Students understand the scope and limitation of the FL bursary (i.e. education-related needs).</p> <p>FL bursary is sufficient for education-related needs.</p> <p>Students spend FL bursary appropriately (i.e. on education-related needs).</p>
Outputs	Tracking and monitoring systems established and functional.	<p># of FL bursars identified for academic support programmes.</p> <p># of FL bursars identified as having changed majors to subjects not aligned to FL priorities.</p>	Data source: HEIs tracking system; HEI reports to the DBE (list of students having changed majors and students receiving academic support).	<p>Tracking and monitoring systems are used to identify students at risk of failing and students who change majors to subjects not aligned to FL priorities.</p> <p>HEIs will collate data and report to the DBE.</p>
	Academic support programmes provided and attended by students.	% of FL students identified at risk of failing who attend academic support programmes.	Data sources: Attendance registers for academic support programmes cross-referenced against list of students identified and targeted for support, HEIs.	<p>HEIs are willing to run academic support programmes.</p> <p>Academic support programmes are</p>

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
				well designed. Students at risk of failing are willing to attend academic support programmes.
	Students receive FL bursaries on time.	% of FL bursars who receive FL bursaries within a stipulated timeframe (to be determined).	Data sources: NSFAS payment database; HEIs FLBP statements; evaluation survey data.	HEIs will be able to support FL bursars financially until FL bursaries are released. NSFAS disburses FL funding on time. HEIs have adequate financial systems and disburse FL bursaries on time.
Activities	Tracking systems established for academic monitoring of students (including students that change specialization).	# HEIs with tracking systems in place to monitor teacher education students.	Data sources: HEIs tracking system; HEI reports to the DBE.	HEIs have the capacity to establish tracking systems. Tracking systems will be effectively utilized by HEIs – students changing majors and at risk of failing are identified.
	Develop and implement academic support programmes for students at risk of failing	# HEIs with academic support programmes for teacher education students.	Data source: HEIs reports to the DBE.	HEIs have the capacity to implement academic support programmes.
	Financial support is provided to FL bursars	# Teacher education students receiving FL bursaries.	Data sources: HEIs FLBP statements; NSFAS payment database.	Money is paid on time upon commencement of the bursary.

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
Objective 3: To effectively place FL graduates in schools identified as under-resourced				
Longer-term outcome	Better alignment between teacher needs and qualified teachers.	Reduction in teacher vacancies in specific subjects, phases and geographic areas of need.	Data sources: PEDs list of teacher vacancies; unemployed teachers' database.	<p>FLBP priority areas are aligned with national and provincial needs.</p> <p>FLBP graduates have specialized in FLBP priority subjects/phases.</p> <p>FL bursars will remain teaching in geographic areas of need.</p> <p>FL bursars will remain teaching the subjects/phases they are trained in.</p>
Intermediate outcomes	PEDs and national have better information about teacher needs (per province).	Feedback from DBE and PED officials regarding awareness of teacher needs.	Data sources: key stakeholder interviews.	Better information about teacher needs per province informs the review and updating of FLBP priority areas.
	FL graduates are placed within the specified time period and appointed into posts.	<p>% FL graduates placed within the specified time period.</p> <p>% FL graduates appointed into permanent posts within one year of graduation.</p>	Data sources: PERSAL database; evaluation survey findings; provincial placement and appointment lists; FLBP MIS (should be available).	<p>Placement within the specified time period (currently 6 weeks) is possible.</p> <p>Schools and PEDs are willing to appoint FL graduates into permanent posts.</p> <p>FL graduates accept appointments.</p>
	Reduction in teacher vacancies (per province), specifically in relation to FLBP priority areas.	# teacher vacancies per province (specifically in relation to the FLBP priority areas).	Data source: PEDs teacher vacancy lists.	Alignment between skills/specialization of FL graduates and teacher vacancies.

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
				# of teachers employed exceeds the number of teachers leaving the system each year.
Outputs	Consolidated list of FL bursars due to graduate and in need of placement.	DBE consolidated list of FL bursars due to graduate, indicating specializations and preferred province	Data source: Collated FL bursar placement lists.	Consolidated list is collated accurately.
	Lists of teacher vacancies per province.	# PEDs with teacher vacancy lists.	Data source: PED vacancy lists.	Lists of teacher vacancies reflect real needs.
	Lists of teacher vacancies matched against FL bursars due to graduate and in need of placement.	# PEDs with list which “matches” vacancies with FL bursars skills/specialization.	Data source: PED lists which “match” teacher vacancies with FL bursars skills/specialization.	Alignment between bursar skills/specialization and school needs. DBE collates and circulates list of unplaced bursars.
	FL graduates appointed into posts.	% of FL graduates matched to teacher needs and appointed.	Data source: appointment letters; PED list of appointees; FLBP MIS.	PEDs prioritize placement of FL bursars (as compared to other teachers and graduates). Schools are willing to accept FL bursars.
Activities	Students complete placement forms, which are collated by DBE and submitted to PEDs.	DBE consolidated list of FL bursars due to graduate, indicating specializations and preferred province.	Data source: Collated FL bursar placement lists (DBE).	DBE has accurate data on FL bursars due to complete their studies. FL bursars will return forms on time. FL bursars will provide accurate information about subjects and phases.

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
	PEDs collect data on teacher vacancies annually.	# PEDs with teacher vacancy lists.	Data source: PED vacancy lists.	<p>PEDs are willing to undertake profiling.</p> <p>PEDs know the location of all schools.</p> <p>Schools provide accurate information about teacher vacancies.</p>
	FL bursars due to graduate are matched with vacant posts.	# PEDs with list which “matches” vacancies with FL bursars skills/specialization.	Data source: PED lists which “match” teacher vacancies with FL bursars skills/specialization.	<p>PEDs are willing to undertake matching.</p> <p>Alignment between bursar skills/specialization and school needs.</p> <p>PEDs send DBE list of unplaced bursars.</p> <p>DBE collates list of unplaced bursars and circulates to PEDs.</p>
	Appointment of FL graduates into vacant posts.	% of FL graduates matched and placed.	Data source: Placement data (DBE and PEDs).	<p>FL bursars will pass their final year and graduate.</p> <p>6 weeks is an adequate time period for placement.</p> <p>Schools will accept the appointment of FL graduates.</p>

Table 3: Proposed logframe to guide the FLBP in the proposed changes outlined elsewhere are accepted

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
FLBP goal	To address educator scarcity and contribute to the supply of qualified teachers in priority phases and subjects, targeting geographical areas of need in South Africa	<p>Supply of teachers specialising in priority subjects and phases since 2008.</p> <p>Supply of teachers to identified geographical areas of need since 2008.</p> <p>% of FLBP graduates still teaching in South African public schools after five years.</p>	Data sources: PERSAL database, FLBP management information system (MIS), DBE and PED statistics on identified teacher needs and teacher placement.	<p>FLBP graduates are qualified to teach priority subjects and phases.</p> <p>FLBP graduates are placed in identified geographical areas of need.</p> <p>FLBP graduates are committed to staying in teaching/education.</p> <p># of teachers entering the system (including FLBP graduates) is equal to or exceeds the number of teachers leaving the system each year.</p>
Objective 1: To provide bursaries which attract academically deserving and financially needy students, with a passion for teaching and the potential to become good teachers, into teacher education programmes, specialising in priority phases and subjects.				
Long-term outcome	Increased number of suitable teacher education graduates specialising in priority areas. Note that this links to objective 2.	# and % FL graduates specialising in priority subjects/phases.	Data sources: HEIs' MIS.	
Intermediate outcome	Increased intake of suitable teacher education students specialising in priority subjects/phases into teacher education programmes.	# and % FL bursars specialising in priority subjects/phases.	Data sources: evaluation survey results; HEI MIS's.	Suitability is determined in terms of academic achievement, demonstrating a passion for teaching, willingness to study priority areas and be placed in areas of need; the bursary will attract students into teaching; teacher

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
				education programmes are aligned with FLBP priority areas.
Outputs	Recruitment activities conducted (national).	# of promotional materials developed # of promotional materials distributed % implementation of annual management plan.	Data source: DBE quarterly reports.	DBE wants to market the FLBP; recruitment campaign is appropriately targeted.
	Recruitment activities conducted (district-based)	# of promotional materials distributed % implementation of annual management plan.	Data source: PEDs quarterly reports.	PEDs and districts want to market the FLBP; recruitment campaign is appropriately targeted.
	Applications made to FLBP.	# of applications (national and district-based) annually.	Data sources: Data source: FLBP MIS.	Applications are complete; applicants chose to specialize in FL priority areas
	FL bursaries awarded.	# of FL bursaries awarded (national, district-based and re-awards).	Data sources: Data source: FLBP MIS.	Applicants are suitable; the FLBP criteria are appropriate and enable selection committees to identify applicants who will make good bursars; bursary applicants apply and will be accepted to study teacher education; successful applicants will accept the bursary and pursue teacher education studies.

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
Activities	National recruitment campaigns by DBE (development of promotional material, promotion via radio and social media, roadshows and open days).	# of promotional materials developed. # of promotional materials distributed Annual management plan for national recruitment.	Data sources: promotional materials; DBE annual management plan.	DBE wants to market the FLBP; recruitment campaign is appropriately targeted.
	District-based recruitment campaigns (distribution of promotional materials, talks in schools, Principals identify suitable possible candidates).	# of promotional materials distributed Annual management plan for district based recruitment.	Data source: PEDs annual management plan.	PEDs and districts want to market the FLBP; recruitment campaign is appropriately targeted; Principals are willing to identify learners with the potential to become good teachers.
	South Africans apply for the FLB (online and district-based applications).	# of applications (national and district-based) annually.	Data source: FLBP MIS.	Applicants are aware of the deadlines and application procedures.
	Screening and selection of FL bursars (HEI and district-based and re-awards).	Meetings of selection committees (provincial and HEI based). List of approved FL bursars.	Data sources: meeting minutes; selection reports; approved bursar list.	Selection committees apply FLBP criteria when selecting bursars; stakeholders are able/willing to participate in selection committees.
	FL bursaries awarded to SA youth who meet FL criteria in terms of merit and priority areas.	# of FL bursaries awarded (national, district-based and re-awards).	Data sources: Data source: FLBP MIS.	Sufficient funds are available to award FL bursaries.
Objective 2: To provide financial support to FL bursars to complete their studies – where possible in the minimum time – and graduate specialising in priority phases and subjects.				
Long term outcome	Improved completion and throughput rate of FL bursars (viz-a-viz other teacher education	Completion rate (e.g. % of FL bursars who complete teacher education programmes in the minimum time,	Data sources: HEMIS, HEIs MIS, FLBP MIS, evaluation survey.	HEMIS/HEI MIS and FLBP MIS are capable of tracking student

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
	students and in comparison to previous years).	the minimum time +1 year...). Average number of years FL bursars take to obtain a qualification.		progression and graduation.
Intermediate outcomes	FL bursars receive necessary academic and other support	Feedback from FL bursars regarding the adequacy of support provided.	Data source: feedback from bursars.	
	Increased pass rate (year-on-year) of FL bursars (decreased number of drop-outs/under-performing students).	# and % of FL bursars who pass each year and receive a re-award.	Data source: HEIs year-on-year pass rates; (should be on FLBP MIS).	Academic support programmes are effective – student performance improves. HEIs are willing to provide academic performance data to the DBE.
	FL bursars are able to support themselves with the FL bursary for the entire academic year.	% of FL students who state that they were able to support themselves adequately for the entire academic year.	Data source: feedback from bursars.	Students understand the scope and limitation of the FL bursary (i.e. education-related needs). FL bursary is sufficient for education-related needs. Students spend FL bursary appropriately (i.e. on education-related needs).
Outputs	Tracking and monitoring systems established and functional.	# HEIs who provide information on student progress and change in specialisations to FLBP	Data source: HEIs tracking system; HEI reports to the DBE (list of students receiving academic support).	Tracking and monitoring systems are used to identify students at risk of failing and students who change majors to subjects not aligned to FL

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
		# of FL bursars identified for academic and other support programmes.		priorities. HEIs will collate data and report to the DBE.
	Academic support programmes provided and attended by students.	# and % of identified FL students who attend academic support programmes.	Data sources: Attendance registers for academic support programmes cross-referenced against list of students identified and targeted for support, HEIs.	HEIs are willing to run academic support programmes. Academic support programmes are well designed. Students at risk of failing are willing to attend academic support programmes.
	Students receive FL bursaries on time.	# and % of FL bursars who receive FL bursaries within agreed upon (to be determined) timeframe.	Data sources: NSFAS payment database; HEIs FLBP statements; evaluation survey data.	HEIs will be able to support FL bursars financially until FL bursaries are released. NSFAS disburses FL funding on time. HEIs have adequate financial systems and disburse FL bursaries on time.
Activities	Tracking systems established for academic monitoring of students (including students specialisations) and linked to FLBP.	# HEIs with tracking systems in place to monitor teacher education students.	Data sources: HEIs tracking system; HEI reports to the DBE.	HEIs have the capacity to establish tracking systems. Tracking systems will be effectively utilized by HEIs – students changing majors and at risk of failing are identified.

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
	HEIs develop and implement academic support programmes for students at risk of failing	# HEIs with academic support programmes for teacher education students.	Data source: HEIs reports to the DBE.	HEIs have the capacity to implement academic support programmes.
	Financial support is provided to FL bursars	# FL bursaries disbursed annually.	Data sources: HEIs FLBP statements; NSFAS payment database.	Money is paid on time upon commencement of the bursary.
Objective 3: To match FLBP graduates with vacancies aligned to their phase and subject specialisations in schools with shortages of qualified teachers.				
Longer-term outcome	Better alignment between teacher needs and newly qualified teachers.	Reduction in teacher vacancies in FLBP priority subjects, phases and geographic areas of need.	Data sources: PEDs list of teacher vacancies; unemployed teachers' database.	<p>FLBP priority areas are aligned with national and provincial needs.</p> <p>FLBP graduates have specialized in FLBP priority subjects/phases.</p> <p>FL bursars will remain teaching in geographic areas of need.</p> <p>FL bursars will remain teaching the subjects/phases they are trained in.</p>
Intermediate outcomes	PEDs and national have better information about teacher needs (per province).	Feedback from DBE and PED officials regarding awareness of teacher needs (subjects, phases, geographic areas).	Data sources: key stakeholder interviews.	Better information about teacher needs per province informs the review and updating of FLBP priority areas.
	FL graduates are placed within the specified time period and appointed into posts.	<p># and % FL graduates appointed into posts within one year of graduation.</p> <p># and % FL graduates appointed into posts within one year of graduation which match their</p>	Data sources: PERSAL database; evaluation survey findings; provincial placement and appointment lists; FLBP MIS (should be available).	<p>Placement within the specified time period (currently 6 weeks) is possible.</p> <p>Schools and PEDs are willing to appoint FL graduates into permanent</p>

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
		skills/specializations.		posts. FL graduates accept appointments.
	Reduction in teacher vacancies (per province and nationally), specifically in relation to FLBP priority areas.	# teacher vacancies per province and nationally (specifically in relation to the FLBP priority areas).	Data source: PEDs teacher vacancy lists.	Alignment between skills/specialization of FL graduates and teacher vacancies. # of teachers employed exceeds the number of teachers leaving the system each year.
Outputs	Consolidated list of FL bursars due to graduate and in need of placement.	DBE consolidated list of FL bursars due to graduate, indicating specializations and preferred provinces.	Data source: Collated FL bursar placement lists.	Consolidated list is collated accurately.
	Lists of teacher vacancies per province.	# PEDs with teacher vacancy lists.	Data source: PED vacancy lists.	Lists of teacher vacancies reflect real needs.
	Lists of teacher vacancies matched against FL bursars due to graduate and in need of placement.	# PEDs with list which “matches” vacancies with FL bursars skills/specialization.	Data source: PED lists which “match” teacher vacancies with FL bursars skills/specialization.	Alignment between bursar skills/specialization and school needs. DBE collates and circulates list of unplaced bursars.
	FL graduates appointed into suitable vacant posts within 60 days.	# and % of FL graduates matched to teacher needs and appointed into vacant posts within 60 days. # and % of FL placed graduates in teaching posts which match their specialization.	Data source: appointment letters; PED list of appointees; FLBP MIS.	PEDs prioritize placement of FL bursars (as compared to other teachers and graduates). Schools are willing to accept FL bursars.

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
Activities	Students complete placement forms, which are collated by DBE and submitted to PEDs.	DBE consolidated list of FL bursars due to graduate, indicating specializations and preferred province.	Data source: Collated FL bursar placement lists (DBE).	DBE has accurate data on FL bursars due to complete their studies. FL bursars will return forms on time. FL bursars will provide accurate information about subjects and phases.
	PEDs collect data on teacher vacancies annually.	# PEDs with teacher vacancy lists.	Data source: PED vacancy lists.	PEDs are willing to undertake profiling. PEDs know the location of all schools. Schools provide accurate information about teacher vacancies.
	FL bursars due to graduate are matched with vacant posts.	# PEDs with list which “matches” vacancies with FL bursars skills/specialization.	Data source: PED lists which “match” teacher vacancies with FL bursars skills/specialization.	PEDs are willing to undertake matching. Alignment between bursar skills/specialization and school needs. PEDs send DBE list of unplaced bursars. DBE collates list of unplaced bursars and circulates to PEDs.
	Appointment of FL graduates into suitable vacant posts.	# and % of FL graduates matched and	Data source: Placement data (DBE and PEDs).	FL bursars will pass their final year and

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
		placed. # and % of placed FL graduates in teaching posts which match their specialization.		graduate. 6 weeks is an adequate time period for placement. Schools will accept the appointment of FL graduates.
Objective 4: To track FLBP bursars, to ensure that they fulfil their service commitments and monitor their performance over time.				
Longer-term outcome	Better monitoring of funding and a more cost-effective programme	Cost-effectiveness of the FLBP, as ascertained through a future evaluation.	An evaluation report.	Data will be available in future for an evaluator to conduct cost-effectiveness analysis.
Intermediate outcome	Funds returned to the FLBP bursary fund by students not teaching in public schools	R value of FLBP bursaries returned.	NSFAS information management system.	NSFAS will be willing to provide this data to the FLBP.
	Accurate data available on the service status of FLBP graduates and cost effectiveness of the programme	Availability of accurate cost and placement data for monitoring and evaluation purposes	FLBP information management system.	The FLBP is committed to collecting this data.
Outputs	Mechanism to convert bursaries to loans	# of loan agreements with FLBP bursars	NSFAS information management system.	NSFAS will be willing to provide this data to the FLBP.
	Placement and tracking system	A placement and tracking system	FLBP information management system.	The FLBP is committed to putting a placement and tracking system in place.
	Annual reports on the status of FLBP graduates	Annual report on the status of FLBP graduates	Annual monitoring reports.	
Activities	Establish a mechanism to convert bursaries into loans	A mechanism to convert bursaries to loans	NSFAS information management system.	NSFAS will be willing to provide this data to the FLBP.

	Logical hierarchy	Objectively Verifiable Indicators (OVI)	Means of Verification; Source of Verification information	Important Assumptions
	Establish a placement and teaching tracking system	A placement and tracking system	FLBP information management system.	The FLBP is committed to putting a placement and tracking system in place.
	Monitor FLBP graduates annually to ascertain the status of their service obligations	Evidence of monitoring	Annual monitoring reports.	

References

For a full list of references, see the full FLBP implementation evaluation report.

Annexure C: Initial Programme Theory Interview Schedule

INTRODUCTION

JET has been appointed to evaluate the implementation of the FLBP for the period 2007 – 2012. This is an explorative interview. This interview forms part of a set of initial interviews with key individuals involved in the FLBP since its inception and will inform the development of a draft Theory of Change and programme log frame for the FLBP to be delivered as part of the evaluation and debated at a stakeholder workshop in August 2014.

The key purpose of the interview is to gain an understanding of the programme’s overall goals, its key objectives and processes established to achieve objectives, focusing in particular on the inception of the programme in 2007 and the period up to 2012. The interviews will therefore assist in providing a historical overview of the programme and its development as well as providing a current Theory of Change and log frame for the FLBP.

During the interview I would also like to explore your experience, views and thoughts on the extent to which the FLBP has achieved its objectives, achievements and constraints of the programme design and implementation, what you see as successes and lessons learnt. I will be asking you structured questions in this interview to guide our conversation.

CONFIDENTIALITY

Information you provide in this questionnaire is strictly confidential. No names will be used in reporting research findings. Quotes will be anonymous and general themes will be reported on. The interview is a safe environment for you to share your perceptions and experience. Thank you for taking the time to be interviewed.

Interviewer:		Date of interview:		
Name of person(s) being interviewed		Designation (current occupational role)		
Role on the FLBP		Length of involvement in the FLBP programme (yr)		
Interviewee contact details	Telephone		Email	

A) CLARIFYING FLBP NEED, GOALS AND OBJECTIVES

A1. What is the FLBP trying to achieve?

A2. What is your understanding of the problems that drove the need for the program?

A3. In five minutes, please highlight how the program was designed/developed and the key thinking that shaped the design of the program

A4. What assumptions informed the programme design?

A5. Is the need the same as it was in 2007 when the program began?

A6. Has the focus of the programme changed from 2007-2012? In what ways?

A7. What is the overall goal(s) of the FLBP?

A8. Can we confirm the objectives of the programme are the following:

Why are we aiming for each objective?

A9. What processes and structures have been put in place to assist in meeting each of the objectives of the FLBP?

How successful have these been in your view?

B) REFLECTIONS ON THE DESIGN AND IMPLEMENTATION OF FLBP

B1. To what extent would you say the FLBP has achieved its objectives? (Discuss each objective separately)

B2. Is the FLBP supplying teachers in the areas required? Tell me more

Changes...

B3. Are any changes needed to the objectives to strengthen the programme in future?

B4. Would these changes have any implications for programme design?
And for change management?

B5. To what extent would you say the FLBP has achieved its goals set for 2007-2012?

B6. Is the programme design relevant and appropriate in terms of national priorities, education sector context and policy, and institutional environment? Please elaborate on why you say so

B7. Do you think the program goals need to change going into the future? Please elaborate

B8. What are the major constraints facing the FLBP since 2007?

B9. Do you think the program goals need to change going into the future? Please elaborate

B10. Do you think the program goals need to change going into the future? Please elaborate	
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C) LESSONS LEARNT FROM THE FLBP
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<p>C1. Implementation:</p> <p>In your view, what were the FLBPs key implementation achievements over the years?</p> <p>Were there specific achievements relating to:</p>	
Programme Management and Administration	
Recruitment, application and selection	
Funding arrangements	
Monitoring and tracking systems for bursary students	
Graduation and placement	
Training in line with priority areas	
Stakeholder involvement	
Other:	

<p>C2. Challenges encountered</p> <p>What were the programme weaknesses/challenges during the period 2007-2012 that could be turned into lessons learnt in the next phase of the FLBP?</p> <p>Specify these in terms of the following:</p>	<p>Identify the key challenges</p>
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Programme Management and Administration	
Recruitment, application and selection	
Funding arrangements	
Monitoring and tracking systems for bursary students	
Graduation and placement	
Training in line with priority areas	
Stakeholder involvement	
Other:	

D) PROGRAMME STAKEHOLDERS

D1. Can I confirm the programme stakeholders and their responsibilities? Our aim is to consider the activities they are involved in, their outputs/outcomes and key assumptions	Refer to Proposal pg.17 for initial role descriptions
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Stakeholder	Responsible for:	Assumptions critical to allow achievement of goals/objectives	Activities	Outputs & Outcomes
DBE				
HEIs				
NSFAS				
PEDs				
DHET				
Other:				

D2. As a stakeholder, what are your views on the effectiveness of the programme?	
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E) BUILDING A LOG FRAME AND THEORY OF CHANGE FOR THE FLBP

Does the programme have a log frame?

For the next range of questions, we are going to make notes and linkages on flip-chart paper to guide our discussion.

The purpose of this is to build a logframe (or logic model) and theory of change that provides information about the elements that intervene between program activities and the achievement (or non achievement) of expected results (outcomes). The logic model displays statements in a simple flow chart that outlines the needed resources (inputs), activities, expected outputs and desired outcomes. Once the model is developed, the logic of the linkages is assessed.

When the theory on which the evaluation is based is fine grained, the evaluation can track each link in the chains of assumptions and can show which chains of assumptions are well supported by data collected and which chains of assumptions break down. This should lead to more effective strategies in future as a result of implementation evaluation findings.

We will consider one objective at a time and map it out into the logframe provided on the flip-chart

E1. What activities (actions) should be/have been initiated to drive achievement of each objective?

E2. What resources are required to implement each activity? How does the FLBP gain the commitment of these resources?

E3. What are the tangible results (outputs) of each of the main activities?

E4. What other changes in behaviours are you expecting to see as a result of what was gained (the outputs) through actions (activities)

E5. What external conditions/contextual factors may have an effect on

implementation of each activity and its potential to bring about desired outputs and outcomes?	
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E6. Are there any assumptions at play for activities to reach outputs or for outputs to reach outcomes?	
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E7. What data is collected to monitor progress of activities and outputs leading to achievement of objectives and goals?	
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Summary and confirmation

<p>E8. By looking at the elements of the program described, please re-cap on the logical flow of the program from resources to solving the longer term problem</p> <p>(note: a Logic Model should have no more than 5 activity groupings)</p> <p>Are all elements accounted for that are relevant to meeting objectives and goals set or those that should be set for future? If not, let us add missing elements</p>	
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E9. Have all relevant external contextual factors been identified and their potential influences described?	
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Move to section F if 30 minutes are available before interview completion

E) ADDITIONAL COMMENTS OR ASPECTS TO CONSIDER DURING THE RESEARCH
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E1. Do you have any other comments that you believe we should be aware of when undertaking the implementation evaluation of the FLBP?	
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Confirm interview list and determine who is best placed for an initial interview (Addition of contact details required for some interviewees):

F) RECRUITMENT AND SELECTION QUESTIONS (TIME PERMITTING)

F1. What is the relationship between stakeholders in relation to the selection and recruitment of FLBP holders?	
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F2. What recruitment strategies are in place?	
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F3. How effective are these, in your view, in reaching the target population (youth from rural and poor areas?) Elaborate	
--	--

F4. What are the main outcomes of the recruitment strategies in place?	
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THANK YOU FOR TAKING THE TIME TO PROVIDE YOUR VALUABLE INPUTS
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Annexure D: Report on Programme Theory Stakeholder Workshop

Funza Lushaka Bursary Programme Stakeholder Workshop on Programme Theory

Held 19-20 August 2014 at the Department of Basic Education

Workshop Process and Overview Report (accompanies Theory of Change and Log Frame Report)

Introduction and Overview

JET Education Services has been contracted to conduct an implementation evaluation of the Funza Lushaka Bursary Programme (FLBP) for the period 2007 to 2012. As part of the evaluation, JET is required to produce a Theory of Change and Logframe for the FLBP. To assist in this process, a workshop was held involving a range of stakeholders who participate in the administration of the FLBP. An initial workshop report was submitted in September 2014.

This report details the approach to the workshop and the key activities undertaken. The workshop provided an opportunity for FLBP stakeholders to reflect on the vision, goals and objectives of the programme and to participate in the development of a comprehensive Theory of Change and Logframe for Funza Lushaka to be submitted as one of the evaluation deliverables.

The discussions held at the workshop were incorporated into the development of the Theory of Change/Logframe document. A total of 74 individuals (including facilitators) participated in the workshop over the two-day period, representing a range of stakeholders and including representatives of the DBE, NSFAS, the provincial education departments, and universities. The participant lists are available. The workshop was jointly planned and facilitated by JET Education Services and the Department of Planning, Monitoring and Evaluation (DPME).

Workshop structure

The workshop consisted of 7 sessions over a two day period. A summary of each session is provided below.

Session 1 - Introductions, key M&E concepts and terms

During this session, participants were given the opportunity to familiarise themselves with key monitoring and evaluation terminology used in theory of change and logframe development. These terms included: Purpose; Programme goal; Objectives; Output; Outcome; Activity; Assumptions; Indicators and Targets. This session also laid a foundation for understanding the terminology to be used in the workshop. The agreed definitions for these terms were discussed and explained to participants and are available at the end of this report.

Session 2- Formulating the purpose, goal and objectives of the FLBP

Participants in groups reflected on their understandings of what the FLBP is trying to achieve. Each group discussed 2-3 specific objectives and an overall goal for the programme. In the feedback session these goals, purpose and objectives were discussed in relation to the initial ideas of the

evaluation team (based on initial high-level interviews with a group of DBE managers and former managers involved in the establishment of the FLBP).

In the feedback session, suggested revisions and contributions to the purpose were presented by the groups and were incorporated into the final Theory of Change/Logframe document, which accompanies this report.

Session 3 –Key Business Processes of the FLBP

The evaluation team presented their understanding of the key business processes of the FLBP. A handout explaining the business processes was provided to participants, along with visual displays placed on the walls of the venue. Through an interactive process, individuals identified at least one key business process in which they were involved and voted on areas of good and bad performance.

The business processes of the FLBP, as understood by the evaluation team were presented and described in Annexure D. The main discussion points about what is working well and not working well in relation to the key business processes were incorporated into the TOC/Logframe document submitted and were also used to inform the instrument development for the qualitative and survey components of the research process.

Session 4 – Detailed discussion of key business processes

Individuals were reallocated to groups according to the business process that they identified themselves as most involved in. In these new groups, delegates have to identify what different sections are responsible for, as well as what they feel has worked well, and what needs to be addressed. This was recorded in notes and on the flipcharts provided.

The business model for the FLBP was discussed, delegates rated each process, and they also worked in groups for each process they were involved in to address aspects they felt were successful and aspects they felt were poor. They also suggested what could be done to improve their process in the model.

Session 5 - FLBP timeline

The evaluation team presented a skeleton timeline of the development of the FLBP, highlighting key activities for the period 2007 to 2012 (the period under evaluation). Participants were requested to provide information and suggestions about their understanding of key development points, activities and policy shifts in the FLBP over time. This timeline provided an important basis for understanding the FLBP over time, and was integrated in the Theory of Change/Logframe document and assisted in informing the evaluation process and reporting. Groups were also asked to rate the best and worst performing aspects in the timeline, which helped to highlight key issues requiring exploration in the research phase of the evaluation.

Session 6 – Building a Logframe for the FLBP

This session was the primary focus of the second day of the workshop and aimed to construct, in groups, activities and outcomes for the FLBP, based on the first day discussions on objectives. The

activities and outcomes identified formed the basis for the further development of the Programme Logframe for FLBP by the evaluation team.

The evaluation team provided an overview of how logframes are constructed and an example was presented to the workshop.

Each group was provided with one of the three FLBP objectives, and from that they described the activities required to achieve their objective, the expected outputs and outcomes. Groups were also requested to describe the assumptions that they hold that may support or restrict the activities proposed to achieve their objective.

Session 7- Theory of Change

During this session, the evaluation team described the process of developing a Theory of Change for a particular programme. A Theory of Change (ToC) is a specific methodology for planning and evaluation that defines goals and maps what preconditions are necessary to achieve these goals. They are structured as "If...Then" statements. "If" introduces the scenario or the proposed change to be made, and "Then" described the expected results from the introduction of the conditions.

A draft Theory of Change was presented to participants and a group discussion then took place to adapt and improve the draft statement. The revised Theory of Change is presented in the final document submitted to the DPME and DBE which accompanies this report.

Conclusion:

Delegates were pleased with the results of the activities, and that they were able to participate, contribute their knowledge and debate the different aspects of the FLBP. The workshop allowed them to engage with the theory which in government they generally do not do. For some delegates, the workshop brought context to what people engage with, and provided background that they do not usually engage with.

Theories of change were developed to address the concern that programmes are not sufficiently planned and thought through in the design process. Insufficient time devoted to understanding the nature of the problem being addressed and what the theoretical underpinnings of the project are. Logframes are increasingly used to articulate results-based approaches to development programmes at national level and in the non-profit sector. The South African government is increasingly using these approaches to improve programme design and shared understandings of programme goals, as part of a focus on building monitoring and evaluation capacity within and across government.

The workshop evaluation forms reflect a workshop that was well-planned, well-attended, educational for participants and constructive in its results. The facilitator's guide for this workshop is attached included below.

DEFINITIONS OF EVALUATION TERMS

PROGRAMME PURPOSE

The publically stated objectives of a programme or project (Development Assistance Committee, 2002).

PROGRAMME GOAL

Programme goals relate to the overall mission of the programme and are stated in broad abstract terms. The programme goal describes the desired state towards which the programme is directed (Rossi, Lipsey &Freeman, 2004).

OBJECTIVE

Programme objectives stem from programme goals. The programme objective refers to specific statements of measurable form that will be necessary to achieve the programme goal (Rossi, Lipsey &Freeman, 2004).

OUTPUT

The final products or goods and services produced for delivery (Rabie &Ackron, 2011).

Information, products or results produced through activities or projects. Outputs reflect what was expected to be achieved from inputs (Clarke, 2006, CINDI Networks, Handbook on Monitoring and Evaluation).

OUTCOME

Changes or benefits resulting from activities and outputs. Changes in learning, knowledge, attitude, skills, understanding, behaviour, practice, decisions or conditions (US Environmental Protection Agency, 2007).

ACTIVIITY

The processes or actions that use a range of inputs to produce the desired outputs and ultimately achieve outcomes (Rabie & Ackron, 2011). In essence 'what we do'.

ASSUMPTIONS

Conditions outside the control of an organisation or proposed programme that are likely to affect programme or intervention results and that are assumed will or will not take place (Clarke, 2006).

INDICATOR

Quantitative or qualitative factor or variable that provides a simple and reliable means to measure achievement, reflect changes or assess performance (Development Assistance Committee, 2002).

TARGET

The specific, planned level of result to be achieved within an explicit timeframe (USAID, 2010).



JET EDUCATION SERVICES

*Funza Lushaka Bursary Programme
Theory of Change Workshop
Facilitators Guide*

This Document outlines a detailed facilitators guide for the FLBP theory of change workshop which will take place at the DBE Conference Centre between 09h00 Tuesday 19 August and 12h45 Wednesday 20 August 2014. The facilitators are from JET Education Services (JET) and the Department of Planning Monitoring and Evaluation (DPME). The Department of Basic Education (DBE) delegates will participate in the workshop.

Registration will be handled by the DBE and JET (Hazel Mugo). As delegate register they will be given a name tag with a coloured sticker attached, the coloured sticker will be used to determine working groups. There will be six groups with a maximum of 12 participants per group (excluding facilitators).

Chairperson: Thandi Lewin

The role of the Chairperson is to ensure that sessions run to time. Most sessions will be facilitated by the Lead and Group facilitators.

Lead facilitators: Eleanor Hazell: JET; Antonio Hercules: DPME

Group facilitators: Thandi Lewin, Eleanor Hazell, Benita Reddi, Trish Heimann, Monica Mawoyo, Hazel Mugo

Scribe (for plenary sessions): Dorcas Malahlela: JET

Table 1: Schedule for Theory of change workshop

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
8:30-9:00	DBE	Arrival and coffee	Ready to start on time at 9:00		Tea/coffee
9:00-9:15	DBE: Gerrit Coetzee DPME: Antonio Hercules	Official welcome and purpose of the meeting	Ensure delegates feel welcome, explain the purpose of the meeting, introduce the facilitators	DBE will welcome delegates to the meeting and thank those that have travelled far. DPME will explain the purpose of the meeting and the format – it is not a lecture-style workshop, it will be very interactive. Due to the sheer numbers, many of the sessions will involve people working in small	None

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				groups. DBE will introduce the facilitation team from JET and the DPME (lead facilitators and group facilitators).	
9:15-9:20	DPME: Antonio Hercules	Introduce Session 1	Provide a clear explanation of session 1 and explain the seating arrangements	Introduce Session 1: Run through activity, materials and output (see below) Explain seating arrangements: the idea is to have mixed groups and for people to work with people they do not know. Delegates should sit at the table which contains a card which is the same colour as the card on their name tag.	Description of session 1 activity on PPP
9:20-9:25	None	Delegates find their tables	Delegates move to the correct tables		Delegate name tags with coloured stickers; coloured card on six tables.
9:25-9:40	Group facilitators	Introductions and workshop concepts	Delegates get to know the people in their group; delegates discuss and "match" M&E	5 minutes introductions, 10 minutes workshop concepts. Groups should nominate a scribe.	A4 individual handout with workshop concepts and

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
			concepts to the correct definition	<p>a) In pairs, introduce yourself, your role in the FLBP and the province/organisation you are from. Then feedback to the group about your partner (if odd number, Facilitator joins in)</p> <p>b) Match concepts (outlined below) to their definitions:</p> <ul style="list-style-type: none"> • Purpose, • Programme goal, • Objective, • Output, • Outcome, • Activity, • Assumption, • Indicator, • Target <p>Definitions have been written onto cards, groups identify the concept that goes with each definition, write it on a piece of the same coloured card and stick both on the group wall.</p>	<p>definitions (jumbled up).</p> <p>Per group - definitions written on coloured card, blank cards for delegates to write the concepts onto, koki pens, prestik.</p>
9:40-9:50	DPME: Antonio Hercules	Feedback on key workshop concepts	The meaning of the key workshop concepts is clarified	Facilitator goes through the "correct" concept linked to each definition, checks whether groups matched them correctly	PPP M&E concepts matched with definitions

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				and clarifies if necessary. Groups to re-organise concepts and definitions - if not correctly matched – which are stuck on the group wall.	
9:50-9:55	JET: Eleanor Hazell	Introduce session 2	Provide a clear explanation of session 2	Introduce Session 2: Run through activity, materials and output (see below) and an example.	Example on coloured cards, PPP with instructions for task.
9:55-10:55	Group facilitators	FLBP purpose, goal and objectives	Delegates reflect on and discuss the purpose, goal and objectives of FLBP and develop a purpose statement, goal and 3-4 objectives for the FLBP.	Purpose and goal 20 minutes, objectives 40 minutes. Groups to nominate a spokesperson and a scribe (a different person than for session 1). Group to discuss their understanding of the purpose, goal and objectives of the FLBP (scribe to take notes). After discussion, group to agree on definitions for the FLBP purpose, goal and objectives and write these onto pieces of card (same colour as purpose, goal and objectives from session	Per group - flip chart paper, koki pens, blank pieces of coloured card, prestik.

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>1).</p> <p>Stick onto the wall so that each group can review other groups' during breaks.</p> <p>Answer the following questions:</p> <ul style="list-style-type: none"> a) What is the overall purpose of the FLBP? (Capture as a statement) b) What is the FLBP goal? c) What are FLBP objectives (3-4 maximum)? 	
10:55-11:10	JET: Benita Reddi	Feedback on FLBP purpose, goal and objectives	Delegates provide feedback on their understanding of the FLBP purpose, goal and objectives	<p>2.5 minutes per group</p> <p>Facilitator asks the spokesperson from each group to provide feedback on <u>either</u> their purpose, goal or an objective for the FLBP. Ask spokespersons to emphasise how their description is similar or different to what has been said before.</p> <p>Explain that the FLBP definitions will remain on the wall and groups can view each other's work during breaks.</p>	None
11:10-11:30	JET: Trish Heimann	Evaluation team's understand	Delegates are introduced to the evaluation	Short presentation from JET which explains the process followed by the	PPP

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
		ing of FLBP purpose, goal and objectives	team's understanding of the FLBP purpose, goal and objectives	evaluation team to draft the purpose, goal and objectives of the FLBP for the evaluation and outlines these.	
11:30-11:35	JET: Eleanor Hazell	Introduce activity	Provide a clear explanation of activity	Run through activity, materials and output (see below)	PPP with instructions for task.
11:35-11:55	Group facilitators	Comparison of delegates and evaluators FLBP purpose, goal and objectives	Delegates identify similarities and differences between their and the evaluation team's understanding of the FLBP purpose, goal and objectives	<p>Reading through 5 minutes, discussion 10 minutes, prepare to feedback 5 minutes.</p> <p>Groups nominate a spokesperson and a scribe (a different person than for the previous activity).</p> <p>Facilitator provides the group with a handout of the FLBP purpose, goal and objectives developed by the evaluation team and indicates that the group should read through and identify differences between theirs and the evaluation team's understanding, differences to be highlighted in red.</p> <p>Groups to discuss what they identified that was</p>	<p>A4 individual handout with FLBP purpose, goal and objectives developed by the evaluation team, red pens.</p> <p>Per group - flipchart paper and kokis.</p>

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>not included in the evaluation team's description of the FLBP and whether they think it should be included and what the evaluation team included which they did not. Main points to be captured on flipchart paper, including proposed amendments (if any) to the FLBP description.</p> <p>Activity output: Differences between delegates and evaluation team's understanding of the FLBP purpose, goal and objectives. Flipchart papers with notes on suggested amendments.</p>	
11:55-12:15	JET: Eleanor Hazell	Feedback on differences between delegates and evaluators FLBP purpose, goal and objectives	Delegates make suggestions and inputs as to how they feel the FLBP purpose, goal and objectives should be adjusted	<p>3 minutes per group</p> <p>Facilitator asks the spokesperson from each group to provide feedback on similarities and differences between theirs and the evaluators understanding of the programme purpose, goal and objectives. Each group to provide feedback on <u>one component only</u>.</p> <p>Explain that suggested</p>	None

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>amendments (flipchart paper) will remain on display and groups can view each other's work during breaks.</p> <p>Explain that more time will be spent in the afternoon session looking at FLBP objectives and unpacking these.</p>	
12:15-12:25	JET: Eleanor Hazell	Introduce session 3	Provide a clear explanation of session 3	Introduce Session 3: Run through activity, materials and output (see below) and an example.	PPP which outlines FLBP key business processes.
12:25-12:45	Group facilitators	Groups populate the FLBP diagram	Delegates identify which business process their role links most strongly to, and strengths and weaknesses in the process flow.	<p>Reading 5 minutes, group populate FLBP business process diagram 2 minutes each.</p> <p>Delegates read through the description of FLBP business processes and write their names on a blank sticker. Groups take it in turns in their groups to come up to the business processes diagram and delegates stick their name where their role fits best in the FLBP business processes (where your role links to more than one process, choose a process where</p>	<p>A4 individual handout which summarises FLBP key business processes. Blank stickers (to write name on), 1x red and 1x gold dot stickers.</p> <p>FLBP key business processes drawn large on the wall.</p>

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>you want to spend focused time this afternoon).</p> <p>Red stickers are to be stuck on the business process which is not working well and the gold stickers are to be stuck on the business process which is functioning best. Delegates can chose not to place their red and gold stickers if they feel nothing is working badly or well.</p>	
12:45-13:45	DBE (lunch) JET and DPME: Regrouping	LUNCH	Ready to start on time at 13:45	At lunch, review where names are placed on the business process diagram and regroup delegates by key business processes. Indicate business process names on the tables. Ensure sufficient seating to accommodate delegates in a group. If too large, have two tables for a particular business process.	Cards with business processes written on them on/behind tables.
13:45-13:55	JET: Eleanor Hazell	Feedback on FLBP key business processes diagram; introduce	Describe the results of business process voting activity; provide a clear explanation of activity and new	Reflect back what have been identified as the weak and strong points in the FLBP key business processes and explain that we will explore the reasons for this in the	PPP which summarises task PPP which outlines new groups

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
		activity	groupings	<p>next session.</p> <p>Explain seating arrangements: for the next session, delegates will work in groups focused on the business process most closely related to their work. They will discuss the findings of the voting and answer some further questions about their business process. Delegates should sit at the table which is named after their business process.</p> <p>Run through activity, materials and output.</p>	
13:55-14:00	Group facilitators	Delegates regroup	Delegates are correctly regrouped for key business processes activity		Cards with business processes written on them on/behind tables.
14:00-14:45	Group facilitators	Delegates discuss FLBP key business processes	Delegates sit in groups with others involved in a similar FLBP business process	<p>25 minutes discussing and mapping business processes, 20 minutes strengths and weaknesses.</p> <p>Groups to nominate a spokesperson (who will</p>	Per group – coloured card, kokis and scissors

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>stay behind and describe when the groups rotate for feedback) and a scribe.</p> <p>For each business process</p> <ul style="list-style-type: none"> a) Describe the key mechanisms and stakeholders that are involved; b) Map the business process visually on the group wall (using coloured card, kokis and scissors); c) Discuss and capture what is working well and not working well and why on flipchart paper. 	
14:45-15:15	Group facilitators	Groups rotate, review and provide inputs	Delegates review others work and comment	<p>Rotate every 5 minutes. 2 minutes description, 3 minutes comments.</p> <p>Groups rotate clockwise around the room. The business process diagram, strengths and weaknesses is described by the group spokesperson (who remains behind while the rest of the group move). The spokesperson describes the business process and</p>	Group facilitator taking notes.

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>the visiting group ask questions and comment. The group facilitator captures the discussion.</p> <p>Questions to guide comments:</p> <ul style="list-style-type: none"> • Do you agree with the steps or are there other relevant steps that should be included in the business process? • Do you agree with the description of the strengths and weaknesses of the business process? 	
15:15-15:30	DBE	TEA	Ready to start on time at 15:30	During the tea break, group facilitators put coloured cards back on the tables, as delegates will return to the original (colour-based) groupings, and set up the group walls with one of the FL objectives on it, and underneath, from left to right cards with the headings: activities, outputs and outcomes.	Coloured card on six tables; FLBP objectives written large; headings on coloured card, prestik.
15:30-15:40	JET: Eleanor Hazell	Introduce session 4	Provide a clear explanation of session 4	Introduce Session 4: Run through activity, materials and output (see below) and an example.	Coloured card with an example written on it, prestik.

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>The purpose is to develop a shared understanding of how the FLBP is supposed to work and identify activities, outputs and outcomes which relate to one of the FLBP objectives.</p> <p>Go through an example.</p> <p>Explain that delegates will be return to their original groups and will work on one of the FLBP objectives.</p> <p>Note that the groups will likely not finish this activity in the last 45 minutes, they will continue tomorrow.</p>	PPP with instructions for task.
15:40-15:45	Group facilitators	Delegates regroup	Delegates go back to their original (colour) groupings		Coloured stickers on delegate name tags; same coloured card on six tables.
15:45-16:20	Group facilitators	Build FLBP logframe components	Delegates build a logframe for one of the FLBP programme objectives	<p>Aim to cover objective, key activities and outputs during the afternoon session.</p> <p>Groups to nominate a spokesperson and a scribe (a different</p>	FLBP objectives written large, column headings written on coloured

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>person than for the previous activities).</p> <p>Delegates to build a logframe for one of the FLBP programme objectives, the objective is pre-determined, but the group can suggest amendments to it.</p> <p>Note: headings have been stuck on the wall for activities, outputs, outcomes from left to right. Assumptions will be stuck underneath. The colours used for the components should be the same as for session 1.</p> <p>To do:</p> <ul style="list-style-type: none"> a) The group decide whether they are happy with the objective and how it is worded and have the option to make amendments. b) The group identify the key activities relating to the objective they are working on, these are written onto cards which are the "activity colour" and 	<p>card, coloured card in "activity", "output", "outcome" and "assumption" colours, koki pens prestik.</p>

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>stuck below the activity heading on the far left.</p> <p>c) The group identify tangible outputs (things that are achieved as a result of the activities) and write these onto cards which are the "output" colour and stick these below the output heading.</p> <p>d) The group identify the outcomes (expected results) which they expect to see as a result of the outputs, which link to the objective. Outcomes are written onto cards which are the "outcome" colour. These are stuck on the right below the outcome heading.</p> <p>e) At each step in the chain (i.e. between activities and outputs, outputs and outcomes and the objective), the group reflect on assumptions,</p>	

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				these are written on "assumption" coloured card and stuck in the relevant place.	
16:25-16:30	JET: Thandi Lewin	Closure	End workshop day 1	Thank delegates, discuss starting time for Day 2 and focus of Day 2	None
8:00-8:30	DBE	Arrival	Ready to start on time at 8:30		None
8:30-8:40	JET: Thandi Lewin	Welcome	Welcome delegates to day 2, outline focus of day 2.	Welcome delegates back to the workshop. Recap briefly on day 1 and outline the focus of day 2.	None
8:40-8:45	JET: Benita Reddi	Explanation of timeline activity	Provide a clear explanation of timeline activity.	Run through activity, materials and output (see below).	PPP description of activity
8:45-9:00	Group facilitators	Delegates review and discuss FLBP timeline	Delegates review the evaluators understanding of the FLBP timeline and suggest additions.	Delegates read through the FLBP timeline individually and identify if anything is missing, as a group they decide whether to add anything under the following headings (a different coloured card to be used for each): a) Policy b) Design c) Objectives d) Stakeholders	A4 individual handout which summarises FLBP timeline from 2007-2013, coloured card, kokis, prestik

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
9:00-9:15	Benita Reddi and Group facilitators	Groups populate the FLBP timeline	Group make inputs to the FLBP timeline.	2.5 minutes per group. Groups take it in turns in their groups to come up to the timeline and make additions to the timeline (see the headings above). Delegates vote using 1x red and 1x gold dot stickers for a point in the programme history which was a highlight and a low point.	FLBP timeline drawn large on the wall, coloured card, red and gold dot stickers
9:15-9:20	JET: Benita Reddi	Recap of timeline activity	Facilitator describes additions, highlights and low points of the FLBP timeline.	Describe what has been added to the FLBP timeline and what have been identified as the high and low points of the programme. Explain that the timeline will remain on display for the remainder of the workshop.	None
9:20-10:45	Group facilitators	Build FLBP logframe components	Groups complete FLBP logframe building, compare their work from day 1 with the draft logframe developed by the evaluation team and discuss which assumptions hold true and	Group facilitators distribute the evaluation team's FLBP logframe. a) The group review their partially complete logframe and compare it to that developed by the evaluation team. b) The group rework their logframe (in	Logframe developed on previous day, A4 individual handout which summarises the evaluation team's FLBP logframe.

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
			which are flawed.	<p>light of the handout) such that they are satisfied with it and prepared to explain it.</p> <p>c) Depending on how the group are doing, could also look at indicators and targets.</p> <p>d) The group reflect on assumptions, for activities to achieve outputs and for outputs to reach outcomes, these are stuck below and between the relevant components.</p> <p>e) The group identify assumptions which seem to hold true and assumptions which are flawed. They discuss and capture why some of the assumptions were flawed.</p> <p>f) The group review whether the flow from activities to outcomes makes logical sense and answer the following</p>	Coloured card, kokis, flip chart,

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				<p>questions:</p> <ul style="list-style-type: none"> - Is the programme logic complete? - Are all key elements accounted for? 	
10:45-11:00	DBE	TEA	Ready to start on time at 11:00		
11:00-11:30	Group facilitators	Groups rotate, review and provide inputs	Delegates review others work and comment	<p>2 minutes description, 3 minutes comments.</p> <p>Groups rotate clockwise around the room. The objective and logframe is described by the group spokesperson (who remains behind while the rest of the group move). The spokesperson describes the logframe and the visiting group ask questions and comment. The group facilitator captures the discussion.</p> <p>Questions to guide comments:</p> <ul style="list-style-type: none"> • Do you agree with the programme logic? • Are all key elements accounted for? If not, what is missing? • Do you agree 	

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
				with the assumptions? •	
11:30-11:35	JET: Trish Heimann	Evaluation team's understanding of FLBP theory of change	Evaluation team presents their understanding of the FLBP theory of change	Explain that the theory of change is a summary of the logic/thinking which underpins the programme. Describe FLBP theory of change.	PPP on FLBP theory of change; theory of change diagram
11:35-11:55	Group facilitators	Review FLBP theory of change	Groups review and comment on FLBP theory of change	Groups to nominate a spokesperson and a scribe (a different person than for the previous activities). Groups discuss FLBP theory of change and revise statement/diagram if necessary. a) Do you think this statement encompasses the thinking around the programme? If not, revise it	A4 individual handout – theory of change diagram, flip chart paper, koki pens
11:55-12:15	DPME: Antonio Hercules	Feedback from groups on FLBP theory of change	Delegate present their revised/amended FLBP theory of change	3 mins per group. Ask groups spokespersons to provide feedback on suggested amendments to the FLBP theory of change.	None
12:15-12:25	JET: Thandi Lewin	Wrap-up	Delegates provide feedback on	Facilitate reflection on learning of the past two days, what was most	None

Timeslot	Facilitator	Agenda item	Purpose and intended outcomes of session	Process and facilitator's notes	Resources required
			their workshop experience	valuable, what you take away from the session and additional comments 5 minutes discussion in groups, 5 minutes feedback. Ask for feedback from each group, specifically people that have not spoken in the plenary.	
12:25-12:30	Group facilitators	Evaluation forms	Delegates complete evaluation forms.	Group facilitators distribute evaluation forms and provide assistance if necessary.	Evaluation form per delegate.
12:30-12:45	DBE: Gerrit Coetzee	Closing comments	Wrap-up and closure of workshop.	DBE reflects on the workshop and achievements over the past two days.	None
12:45-13:45	DBE	Lunch			

In addition to the specific resources required per session, it would be useful to have a bell/buzzer to use when it is time for the groups to rotate.

Annexure E: Evaluation Matrix Linking Questions to Methods and Data Collection Instruments

Table 1: Evaluation matrix questions and data collection instruments

Evaluation Area	Evaluation Question	Evaluation Methods Used
To what extent is the design of the Programme relevant, appropriate, and technically sound?		
Programme Design	<ol style="list-style-type: none"> 1. Is the programme design relevant and appropriate in terms of national priorities, education sector context and policy, and institutional environment? 2. Is the design of the programme conceptually clear, and coherent? 3. Does the programme have a logframe, and does it comply with standards for technical good practice? 4. What is the underlying Theory of Change (TOC) of the programme? 	<ul style="list-style-type: none"> • Document review of existing documentation on the FLBP. • A literature review of the ITE context in South Africa • A desktop benchmarking exercise to compare with similar national bursaries. • Develop of an explicit Theory of Change/Logframe for the FLBP via interviews with key programme staff involved at the commencement of the programme and a participatory stakeholder workshop to test assumptions, contribute to development process and explore the extent of stakeholder consensus on the Theory of Change/Logframe.
Selection criteria and procedures	<ol style="list-style-type: none"> 5. Is there a clear relationship between the programme objectives and the selection criteria (priority areas)? 6. Is there any conflict between any of the objectives or selection criteria? 	<ul style="list-style-type: none"> • Interviews with key stakeholders • Results of the student survey • Analysis of other relevant data
Monitoring	<ol style="list-style-type: none"> 7. Is there an appropriate framework for collection of data towards assessment of the impact of the Programme? (where appropriate, the particular contributions of stakeholders of FLBP). 8. What is the current framework? 9. How could the current framework for collection of data be more appropriate? 	<ul style="list-style-type: none"> • Desktop research into available documentation and reports on the FLBP • Analysis of the Higher Education Management Information System (HEMIS), PERSAL and FLBP data. • Interviews with programme staff at the DBE and SITA
What are the measurable results of the FLBP, specifically with regards to supply, and placement of FLBP-sponsored teachers? To what extent has the FLBP been effective in achieving its major goals, objectives and intended outcomes? Have recruitment strategies been effective?		
Goals and Objectives	<ol style="list-style-type: none"> 10. To what extent have the goals and objectives of the FLBP been achieved during the period 2007-2012 (Number of students recruited in priority areas, number funded in ITE programmes in priority areas; Number of students completed within a satisfactory time frame; Number of graduates placed in public schools 	<ul style="list-style-type: none"> • Desktop review of available documentation and data. • Interviews with managers of the programme – to confirm whether their understanding of the goals and objectives are the same as in the documentation received. • Descriptive analysis: comparing the data sets against the

Evaluation Area	Evaluation Question	Evaluation Methods Used
	generally and specifically in rural and poor schools; Contribution of FLBP to the supply of qualified teachers in identified priority areas and phase specialization in public schools and rural and poor schools particularly, as compared to total supply)?	<p>targets and objectives.</p> <ul style="list-style-type: none"> • Calculate throughput rates, and compare placement information. Determine historical trends relating to the supply of teachers to determine whether the bursary programme has increased the general supply (looking at broader PERSAL data). • Survey of bursary recipients
Effects of Non-funding	11. How did applicants fare that did not qualify for re-award in terms of completing their studies? (completed by self-funding, picked up the bursary again and completed, changed to other programmes or dropped out)	<ul style="list-style-type: none"> • Survey with bursary recipients • Data analysis from PERSAL, HEMIS and FLBP data
Effects of non-placement	12. How did unplaced graduates fare in terms of finding employment? (public schools, SGB posts in public schools, private schools, other places in the education sectors or outside)	<ul style="list-style-type: none"> • Interviews with FLBP staff (provincial officials) at PEDs, the DHET and the DBE • Data analysis of HEMIS and PERSAL • Student survey
Stakeholders Perceptions	13. What are stakeholders' views on the Programme? 14. Do views vary for various stakeholders or beneficiaries?	<ul style="list-style-type: none"> • Interviews with all stakeholders involved in the FLBP (DBE, DHET, NSFAS, HEIs, PEDs) • Survey with bursary recipients • Focus groups with current FLBP recipients still studying.
Management, Coordination and Collaboration	15. How do stakeholders perceive their roles and responsibilities in managing the Programme efficiently? <ul style="list-style-type: none"> - DBE (overall management, administration, coordination and collaboration). - HEIs (selection, bursary funds, student support, specialization in subject combinations that match priority areas; tracking academic progress). - NSFAS (approval for awards, student contracts, disburse funds to HEIs and report). - PEDs (placements, monitor non-placement, track employment record, sharing good practices, report). - DHET (their role in management of the Funza Lushaka bursary programme? Implementation Protocol; design of initial teacher education programmes; overall teacher supply 	<ul style="list-style-type: none"> • Desktop research from FLBP documents. • Interviews with stakeholders (DBE, HEIs, NSFAS, PEDs, DHET). • Stakeholder workshop on TOC/Logframe • Analysis to understand to what extent stakeholders understand their roles. • Student Survey

Evaluation Area	Evaluation Question	Evaluation Methods Used
	<p>to meet the demands for scarce skills;</p> <ul style="list-style-type: none"> - collaborative structures, including the DBE, DHET and NSFAS Committee; Dean’s Forum and the Provincial Teacher Education and Development Committees (PTEDCs) - Students - Newly-placed teachers 	
<p>In relation to all of the core “business” processes of the Programme, to what extent has the Programme been efficient? Have the management and administrative arrangements underpinning programme implementation been appropriate?</p>		
Management and Administration	<p>16. What have been the primary management and administrative structures, mechanisms, processes, and procedures?</p> <p>17. Were these appropriate to deliver an effective programme?</p> <p>18. To what extent did they function efficiently?</p>	<ul style="list-style-type: none"> • Desktop review – to gain an understanding of the process map(s) that show how management and administration works • Confirm structures and processes through Theory of Change process • Interviews with HEIs, DBE and NSFAS to clarify the process map
Recruitment and Selection	<p>19. What recruitment strategies are in place and how effective are they in reaching the target population (youth from rural and poor areas)?</p> <p>20. District-based recruitment – Registration process in HEIs and issue of promissory letters; mechanisms in place to ensure that recruited students go back to teach in their districts.</p> <p>21. What were the main outcomes of the recruitment strategy?</p> <p>22. Was there alignment between the recruitment and selection processes?</p>	<ul style="list-style-type: none"> • Initial interviews with DBE and desktop review of recruitment and selection process. • Confirmation of processes through TOC/Logframe process • Interviews with HEIs, DBE FLBP team and PEDs • Survey to bursary recipients
Funding	<p>23. What systems are in place to ensure that bursary funds are efficiently managed and utilized?</p> <p>24. Additional question: how is funding allocated?</p>	<ul style="list-style-type: none"> • Interviews with DBE and NSFAS • Survey with bursary recipients.
Stakeholders Involvement	<p>25. To what extent did the various stakeholders contribute to the administration of bursary funds and achievement of Programme outcomes? (DBE allocate funds to HEIs and approve bursary award lists and send them to NSFAS; NSFAS sign Agreements with students, disburse funds to HEI per DBE approved lists and Report; HEIs allocate funds to students and Report to DBE/NSFAS).</p>	<ul style="list-style-type: none"> • Desktop research • Interviews with HEIs (Heads of Schools of Education and the Financial Aid Office of every institution) • Interviews with NSFAS, DBE and PEDs: Student Survey • Focus groups with bursary recipients:

Evaluation Area	Evaluation Question	Evaluation Methods Used
	26. Were these processes effective? 27. Were the processes efficient?	
Funding Arrangements	28. To what extent were the funding arrangements sufficiently flexible and able to identify and deal with emerging challenges (convenience for students, managing declines by students, HEI claims on time, etc) during programme implementation?	<ul style="list-style-type: none"> • Interviews with DBE and NSFAS • Survey with bursary recipients: Question in survey to graduates on turnaround of funding.
Beneficiaries	29. To what extent did beneficiaries (funded students) utilize funds efficiently towards attainment of outcomes)? 30. What is the attitude of Funza Lushaka awardees with regard to receiving money to support their studies and serving in schools (Funding, academic activities; specialization in priority areas; conditions of schools, qualification subjects versus priority needs of the school; support at schools; completion of the obligatory service period and remaining in the teaching profession)?	<ul style="list-style-type: none"> • Survey • Focus groups with students • Investigating the “attitudes” of bursary recipients in relation to the requirements of the bursary to teach in public schools, and related issues of motivation of FLBP students to enter the teaching profession.
Training/Student’s Profiles	31. Bursars in terms of numbers, bursary funds spent? 32. Throughput rate? 33. Dropout rate? 34. Student profile in the bursary programme? 35. Maintaining subject specialization within defined priority areas? 36. Student support (academic, accommodation, etc) and communication with students in HEIs?	<ul style="list-style-type: none"> • Interviews with HEIs, NSFAS and DBE. • Survey with bursary recipients • Analysis of the HEMIS database and analysis of survey data •
Graduation	37. How effective is the process of completion of placement forms, compilation of a placement database by DBE and making it available to 38. PEDs on time?	<ul style="list-style-type: none"> • Interviews with PEDs and HEIs • Focus groups with students at HEIs • Survey with bursary recipients
Placement	39. What placement processes are in place and how effective are they (Coordination by DBE; placement mechanisms in PEDs (match to vacant posts, applying for a post; placement within specified time frame)? 40. Is the placement period for graduates realistic?	<ul style="list-style-type: none"> • Interviews with DBE, PEDs, HEIs • Survey with bursary recipients • Data analysis of FLBP programme data and PERSAL data
Accountability and Monitoring	41. What processes are in place for monitoring and how effective are they (tracking students during their study period in HEIs and graduates once placed)?	<ul style="list-style-type: none"> • Interviews with DBE, PEDs, HEIs. Process map from TOC/Logframe process

Evaluation Area	Evaluation Question	Evaluation Methods Used
Departmental processes and resources	42. To what extent does the DBE manage and coordinate processes and ensure adequate resources (human and physical)?	<ul style="list-style-type: none"> Interviews with DBE officials and other stakeholders .
Cost-Effectiveness	43. Has the strategy been cost-effective in terms of the amount spent and the outputs achieved? 44. Was there value for money in terms of the proportion of funds dedicated towards teacher supply in priority areas?	JET’s understanding from design discussions is that the question here is about “value for money” and the success of the programme investment in relation to its achieved outcomes. <ul style="list-style-type: none"> Basic cost analysis Interviews with HEIs, DBE, PEDs, NSFAS, and Treasury to determine perceived value.
Key Results	45. What are key results for the programme based on available data? 46. What are the key observable trends? 47. What gaps exist in the data? 48. If so, what recommendations are offered for data-related processes – collection, capturing, storage, access, strategic use, etc.?	<ul style="list-style-type: none"> Analysis will provide answers to these questions
Changes	49. Are any changes needed to the objectives to strengthen the Programme in future? 50. What implications would they have for Programme design and change management?	<ul style="list-style-type: none"> Analysis of findings from previous questions will provide inputs to respond to this. This relates to business process, measurable results and the design of the programme.
How sustainable is the FLBP? What key insights, lessons, and recommendations are offered, with a view on the possible scaling up of the FLBP?		
Sustainability	51. What is the assessment of the FLBP in terms of programme sustainability and financial sustainability? 52. To what extent are effective partnerships with stakeholders included in the assessment? 53. What is the process to assess sustainability? How sustainable is the FLBP? 54. What budget is available for the FLBP going forward? 55. Is the programme supplying teachers in the areas required in the correct areas? 56. Are there partnerships to make this sustainable?	<ul style="list-style-type: none"> Interviews with DBE and NSFAS and Treasury Analysis of key data to inform recommendations.

Annexure F: Final Data Collection Instruments

CATI Questionnaire

Changes made on final version based on pilots and call centre feedback

Changes made on final version based on client feedback

Last changes Friday 3 October



Account: Jet Education Funza Lushaka Bursary 2014

Project Code:

CATI questionnaire

General Information

Interviewing method	CATI
Interview length	20 minutes
Copy	Final
Expected interviewing dates	25 September – 18 October (TBC)

General Programming Notes:

NB – All tables except for Q16 must be in alphabetical order

Hardcode the ID numbers, name and surname onto each new survey based on lists provided.

Introduction and Screener

Good day, my name is {intvrs->name}. I am calling you from Ask Afrika, an Independent Market Research company. We are currently conducting research on behalf of the Department of Basic Education through a Student Survey with both current and past bursary recipients to understand student's views and thoughts on the Funza Lushaka (FL) Bursary. We are not selling anything. The interview may take about 20 minutes to complete. Can I continue and ask you the questions?

(IF YES)

Your participation is voluntary and you are free to stop the conversation or to decline to answer questions at any time. Your responses are confidential and your personal information will not be used beyond the scope of this study. There will be no consequences or follow ups as a result of this survey.

1. May I confirm that I am speaking to _____?

Section trigger: If no, continue to Q2, If yes skip to Q3

Interviewer notes: None

No	Yes	Refuse to answer
1	2	77
Continue to Q2	Skip to Q3	Continue to Q2

2. Can you provide an alternative contact number for _____?

Section trigger: Ensure that a 10 digit number is captured. Open end if refuse to answer then terminate

Interviewer notes: Capture correct contact number and phone the respondent.

Number
0
Open end if refuse to answer then terminate

3. Were you awarded a Funza Lushaka bursary at any stage during your studies

No	Yes
1	2
Continue to Q4	Skip to Q5

4. Do you know why your name would appear on a list of students who received a Funza Lushaka teaching bursary to fund their studies?

Section trigger: If the person still does not know about FL and did not receive funding end call.

If person realises they may have received funding and forgot bursary details continue survey.

Interviewer notes: If the person still does not know about FL and did not receive funding end call.

If person realises they may have received funding and forgot bursary details continue survey.

Reason

The Department of Basic Education, (DBE) is conducting a Student Survey with both current and past bursary recipients to understand student's views and thoughts on the Funza Lushaka (FL) Bursary Programme. I will be asking you short or closed ended questions. Your participation is voluntary and you are free to stop the conversation or to decline to answer questions at any time. Your responses are confidential and your personal information will not be used beyond the scope of this study. There will be no consequences or follow ups as a result of this survey.

5. Are you willing to participate?

Section trigger: If Yes, continue with interview, if no, terminate interview.

Interviewer notes: Single Mention

No	Yes
1	2
<i>Terminate</i>	<i>Continue with interview</i>

6. Are you currently studying, have you graduated or dropped out?

Section trigger: None

Interviewer notes: Single Mention

Currently studying/student	Graduated	Dropped out (Did not complete studies, left university)
1	2	3
<i>Continue with interview</i>	<i>Continue with interview</i>	<i>Continue with interview</i>

7. How/where did you first hear about the Funza Lushaka Bursary programme?

Section trigger: None

Interviewer notes: Single Mention. Don't read out.

Funza Lushaka website or brochure	1
Friends and family	2
University information booklets	3
NSFAS offices	4
Schools and teachers	5
District recruitment drive	6
Media, TV or radio (adverts)	7
Community structures (civic organisations, traditional leaders meetings, ward committees etc.)	8
Other (specify):	9

Section A: Biographic Information

Section trigger: The biographic section should be programmed as to come up after the last section in the questionnaire.

8. What is your gender

Male	Female	Refuse to answer
1	2	77

9. In which age category do you belong?

Section trigger: None

Interviewer notes: Single Mention. Read out categories slowly.

18-30	31-40	41-50	51+	Refuse to answer
1	2	3	4	77

10. Under which population group would you classify yourself?

Section trigger: None

Interviewer notes: Single Mention. Only read out categories if respondent hesitates.

Black/African	White	Coloured	Indian	Asian	Other	Refuse to answer
1	2	3	4	5	6	77

11. What is your home language?

Section trigger: None

Interviewer notes: Single Mention. Only the language that you speak most frequently. Only read out if respondent hesitates.

Afrikaans	English	IsiNdebele	IsiXhosa	IsiZulu	Sepedi	Sesotho
1	2	3	4	5	6	7
Setswana	SiSwati	Tshivenda	Xitsonga	Other	Refuse to answer	
8	9	10	11	12	77	

12. Which province are you currently living in?

Section trigger: None

Interviewer notes: Single Mention. Don't read out.

Current province	
Eastern Cape	1
Free State	2
Gauteng	3
Kwa-Zulu Natal	4
Limpopo	5
Mpumalanga	6
North West	7
Northern Cape	8
Western Cape	9

Section B: Educational background and qualifications

I would now like to ask you a few questions about your background and how you got into education.

13. In which province did you finish high school?

Section trigger: None

Interviewer notes: Single Mention. Only read out if respondent hesitates.

Province of origin	
Eastern Cape	1
Free State	2
Gauteng	3
Kwa-Zulu Natal	4
Limpopo	5
Mpumalanga	6
North West	7
Northern Cape	8
Western Cape	9

14. A. What is the name of the high school from which you matriculated?

b. In which Town/Area/Suburb is the school located from which you matriculated?

Section trigger: None

Interviewer notes: Capture verbatim

A. Name	<i>Open end</i>
B. Town/Area/Suburb	<i>Open end</i>

15. In which year did you matriculate?

Section trigger: Numeric response

Interviewer notes: Capture verbatim

Year	<i>Numeric response</i>
------	-------------------------

16. What category of pass did you obtain in your Senior Certificate/Matric examination?

Section trigger: None. Do not put table in alphabetical order since we will only read out first 3 options.

Interviewer notes: Spontaneous mention. Only read out the first three responses.

Read out the rest of the list if they do not recognise an option. Ask respondent to stop you once they recognise the correct option.

National Senior Certificate Bachelor's pass	1
Senior Certificate with Exemption or Endorsement Pass (university entrance pass)	2
National Senior Certificate Diploma pass	3
National Senior Certificate Higher Certificate Pass	4
Senior Certificate without Exemption or Endorsement Pass	5
National Certificate Vocational (Level 4)	6
Matric equivalent from another country	7
Don't know	66
Refuse to answer	77
Other (specify):	

17. a. At which University/ies are you/were you enrolled in for your teacher education studies?

b. For which programme are/were you enrolled

c. When did you start and complete or expect to complete the programme?

d. Did you receive any funding or bursaries?

Section trigger: If current student in Q6, use current tense in questions (i.e. at which university/ies are you enrolled in for your teacher education studies).

If graduate in Q6, use the past tense in the questions (i.e. at which university/ies were you enrolled in for your teacher education studies).

Interviewer notes: Capture Response

Abbreviation	a. University	b. Programme	c. Start	c. Ended/expected end	c. Dropped out	d. Funding or Bursaries
CPUT	Cape Peninsula University of Technology	If PGCE is chosen and completed in 1 year, Skip Q22 to Q25	Numeric Response (i.e.2015)	Numeric Response (i.e.2015)		
CUT	Central University of Technology					
DUT	Durban University of Technology					
NIHE (Mp)	National Institute for Higher Education (Mpumalanga)					
NIHE (NC)	National Institute for Higher Education (Northern Cape)					
NMMU	Nelson Mandela Metropolitan University					
NWU	North West University					
RU	Rhodes University					
TUT	Tshwane University of Technology					
UCT	University of Cape Town					
UFH	University of Fort Hare					
UFS	University of the Free State					

Abbreviation	a. University	b. Programme	c. Start	c. Ended/expected end	c. Dropped out	d. Funding or Bursaries
UJ	University of Johannesburg					
UKZN	University of KwaZulu-Natal					
UL	University of Limpopo					
UNISA	University of South Africa					
UNIVEN	University of Venda					
UNIZUL	University of Zululand					
UP	University of Pretoria					
US	University of Stellenbosch					
UWC	University of the Western Cape					
WITS	University of the Witwatersrand					
WSU	Walter Sisulu University					

18. For which Phase have you specialised or are currently specialising?

Section trigger: Based on the option chosen continue to correct table in Q19. If Option 8, 9 or 77 is chosen skip to Section C

Interviewer notes: Single Mention. Don't read options.

Foundation Phase	1
Intermediate Phase	2
Foundation and Intermediate Phase (FP/IP)	3
Senior Phase	4
Intersen Phase (IP/SP)	5
FET	6
Senior and Further Education and Training (SP/FET)	7
Have not yet chosen (Skip Q19 if and 20 if this is selected)	8
Other: Specify	9

Refuse to answer	77
------------------	----

19. Which two majors have you or are you specialising in?

What subjects did you or are you specialising in to teach?

Section trigger: Based on the option chosen in Q18, select correct table. Put options in alphabetical order.

Interviewer notes: select up to four. Don't read out options.

Intermediate Phase

Afrikaans	1	Sepedi	9
English	2	Sesotho	10
isiNdebele	3	Setswana	11
isiXhosa	4	Siswati	12
isiZulu	5	Social Sciences	13
Life Skills	6	Tshivenda	14
Mathematics	7	Xitsongo	15
Natural Sciences and Technology	8	Refuse to answer	77
Other (specify):			

FP/IP

Afrikaans	1	Sepedi	9
English	2	Sesotho	10
isiNdebele	3	Setswana	11
isiXhosa	4	Siswati	12
isiZulu	5	Social Sciences	13
Life Skills	6	Tshivenda	14
Mathematics	7	Xitsongo	15
Natural Sciences and Technology	8	Refuse to answer	77
Other (specify):			

Senior Phase

Afrikaans	1	Religious/Biblical Studies	11
Creative Arts	2	Sepedi	12
Economic Management Sciences	3	Sesotho	13
English	4	Setswana	14
isiNdebele	5	Siswati	15
isiXhosa	6	Social Sciences	16
isiZulu	7	Technology	17
Life Orientation	8	Tshivenda	18
Mathematics	9	Xitsongo	19
Natural Sciences	10	Refuse to answer	77
Other (specify):			

IP/SP

Afrikaans	1	Religious/Biblical Studies	13
Creative Arts	2	Sepedi	14
Economic Management Sciences	3	Sesotho	15
English	4	Setswana	16
isiNdebele	5	Siswati	17
isiXhosa	6	Social Sciences	18
isiZulu	7	Technology	19
Life Orientation	8	Tshivenda	20
Life Skills	9	Xitsongo	21
Mathematics	10	Refuse to answer	77
Natural Sciences	11		
Natural Sciences and Technology	12		
Other (specify):			

FET Phase

Accounting	1	isiNdebele	21
Afrikaans	2	isiXhosa	22
Agricultural Management Practices	3	isiZulu	23
Agricultural Sciences	4	Life Orientation	24
Agricultural Technology	5	Life Sciences	25
Business Studies	6	Mathematical Literacy	26
Civil Technology	7	Mathematics	27
Computer Applications Technology	8	Mechanical Technology	28
Consumer Studies	9	Music	29
Dance Studies	10	Physical Sciences	30
Design	11	Religion Studies	31
Dramatic Arts	12	Sepedi	32
Economics	13	Sesotho	33
Electrical Technology	14	Setswana	34
Engineering Graphics and Design	15	Siswati	35
English	16	Tourism	36
Geography	17	Tshivenda	37
History	18	Visual Arts	38
Hospitality Studies	19	Xitsongo	39
Information Technology	20	Refuse to answer	77
Other (specify):			

SP/FET

Accounting	1	isiNdebele	23
Afrikaans	2	isiXhosa	24
Agricultural Management Practices	3	isiZulu	25
Agricultural Sciences	4	Life Orientation	26
Agricultural Technology	5	Life Sciences	27

Business Studies	6	Mathematical Literacy	28
Civil Technology	7	Mathematics	29
Computer Applications Technology	8	Mechanical Technology	30
Consumer Studies	9	Music	31
Creative Arts	10	Natural Sciences	32
Dance Studies	11	Physical Sciences	33
Design	12	Religion Studies	34
Dramatic Arts	13	Sepedi	35
Economic Management Sciences	14	Sesotho	36
Economics	15	Setswana	37
Electrical Technology	16	Siswati	38
Engineering Graphics and Design	17	Social Sciences	39
English	18	Technology	40
Geography	19	Tourism	41
History	20	Tshivenda	42
Hospitality Studies	21	Visual Arts	43
Information Technology	22	Xitsongo	44
Refuse to answer	77		
Other (specify):			

20. What influenced your Major subject choice?

What influenced your subject choices?

Section trigger: None.

Interviewer notes: Multiple Mention

Interest in the subject	1
Marks obtained in that subject at school were good	2
Limited by the university entrance requirements	3
Bursary availability for priority subjects/ Funza Lushaka bursary	4

University had space available in the subject (other subjects full)	4
Teacher at school who taught the same subject motivated me	6
Information obtained from career guidance or life orientation	7
I don't know	8
Other (specify)	

Section C: Effects of non-funding

21. a. List the years in which you received the Funza Lushaka bursary
b. In which year of study did you receive the Funza Lushaka bursary?

Section trigger: Link numeric response in A ex 2013, with year of study in B, ex 2nd year

Interviewer notes: Select option. Multiple Mention.

21. A Received Bursary Year(s)	21. B Year of study
Numerical response	1 st year, 2 nd year, 3 rd year, 4 th year, 5 th year, 6 th , 7 th , 8 th , 9 th , 10 th , PGCE =11 th year

22. Were there years in which you did not apply for Funza Lushaka funding?

Section trigger: If yes continue to Q23. If no skip to Q24

Interviewer notes: Select option

No	Yes	Refuse to answer
1	2	77
<i>Skip to Q24</i>	<i>Continue to Q23</i>	<i>Skip to Q24</i>

23. What were the reasons for not applying for funding?

Section trigger: None.

Interviewer notes: Multiple mention

Late for reapplication	1
Did not meet requirements to progress to next year of study	2
Found alternative means of funding my degree	3
Changed subjects to non-priority areas	4
Changed to a different course/degree	5

I Decided I didn't want to do the obligatory service period	6
Other (Please specify)	7

24. Were there years in which you applied for **Funza Lushaka but did not get it?**

Section trigger: If yes continue to Q25 and Q26. If no skip to Section D

Interviewer notes: Single mention IF PGCE is selected and completed in one year, then select N/A

No	Yes	Refuse to answer
1	2	77
<i>Skip to Section D</i>	<i>Continue to Q25</i>	<i>Skip to Section D</i>

25. What was the reason for not receiving funding?

Section trigger: Only answer if yes in Q24 and continue to Q26

Interviewer notes: Single mention. Do not read out unless respondent hesitates or is confused IF PGCE is selected and completed in one year, then select N/A

Late for application/reapplication	1
Did not meet requirements to progress to next year of study	2
Changed subjects/majors to non-priority areas	3
Bursaries were limited so I was not chosen	4
Other stronger students were chosen over me	5
There were not enough funds available	6
I don't know the reason why I did not receive funding	7
Other (Please specify)	8
Refuse to answer	77

26. What alternative plan did you make?

Section trigger: Only answer if yes in Q24.

Interviewer notes: Single mention, do not read out unless respondent hesitates or cannot respond

Completed the year of study by self-funding (e.g. parents assisted, got a job etc.)	1
Completed the year of study by another bursary programme or NSFAS	2
Completed the rest of the degree by self-funding (e.g.	3

parents assisted, got a job etc.)	
Completed the year of study by another bursary programme or NSFAS	4
Picked up the Funza Lushaka bursary again and completed	5
Got another bursary to pursue teaching	6
Pursued another degree	7
I left university (dropped out)	8
Other (Please specify)	9

Section D: Management, Coordination and Collaboration

27. Indicate the extent to which you agree with the following statements relating to the management of the **Funza Lushaka?**

Section trigger: Last two options should only be asked if option 1 or 2 – currently studying or graduated was selected in Q6.

Interviewer notes: Read out.

	Agree	Disagree	
1. It is easy to access the Funza Lushaka application forms	1	2	
2. When I applied for the Funza Lushaka bursary, I got a response before the academic year started	1	2	
3. I was aware of the selection criteria and requirements	1	2	
4. Bursary funds were distributed in line with the university payment deadlines	1	2	
5. The forms for placement in schools, after your studies, were made available early	1	2	Only ask if 1 or 2 selected in Q6
6. The placement requirements and rules were properly explained to students	1	2	Only ask if 1 or 2 selected in Q6

28. Which difficulties or challenges have you experienced with your bursary?

Section trigger: None

Interviewer notes: Multiple mention

Late payment of tuition fees	1
Difficulties with obtaining funds for accommodation and travel	2
Difficulties with obtaining funds for text books	3

Difficulties with registration due to bursary funding not being finalised	4
Delays in being placed in a teaching position	5
Issues in relation to being declared a defaulter	6
Difficulty with the application process	7
Waited a long time for selection to be finalised	8
Unclear about the priority areas	9
Poor communication about status of placement	10
Other (Please specify)	11

Section E: Funding and Funding Arrangements

29. Was the funding sufficient to cover your academic costs? (tuition, textbooks, accommodation and meals)

Section trigger: None

Interviewer notes: Single mention

Remove
question

No	Yes	Refuse to answer
1	2	77

30. Which of the following costs did your **Funza Lushaka bursary allocation cover?**

Section trigger: If support families was selected continue to Q31.

Interviewer notes: Read out options for y/n response. Single mention.

	Yes =2	No=1
Tuition fees	2	1
Accommodation	2	1
Textbooks	2	1
Stationery	2	1
Electronics (laptops, ipads, phones)	2	1
Transport	2	1
Airtime and internet access	2	1
Meals	2	1
Entertainment	2	1

Support families	2	1
Clothing	2	1
Other:	2	1

31. Please estimate the amount of money you gave to support your family each month?"

Section trigger: Only answer if support families was selected in Q30

Interviewer notes: Capture numeric

Amount
R
Refuse to Answer

32. At the end of the year, the balance of the Funza Lushaka bursary amount is paid out to students in cash. Did you have any surplus funds, from your Funza Lushaka bursary, paid back to you?

Were any balances paid back to you?

Section trigger: If yes continue to Q33, if no skip to Section F

Interviewer notes: Single mention

No	Yes	Refuse to answer
1	2	77
<i>Skip to Section F</i>	<i>Continue to Q33</i>	<i>Skip to Section F</i>

33. What was the reason for you having surplus funds?

What was the reason for you having a balance?

Section trigger: Only answer if yes in Q32.

Interviewer notes: Multiple Mention. Only read out if respondent hesitates or does not know.

Had financial support from family	1
University adjustments to fees or course structure resulted in lower than expected costs	2
Awarded additional funding through university scholarships	3
Awarded additional funding through another bursary	4
Part time work	5
Spouse	6
Other (Please specify)	7

Section F: Beneficiaries

34. What motivated you to choose teaching as a career? Rate the extent to which you agree with the following statements on a scale of 1 to 4 where 1 is Strongly Disagree, 2 Disagree, 3 Agree and 4 Strongly Agree.

Section trigger: None

Interviewer notes: Read out scale and repeat if respondent forgets or misunderstands.

I studied to be a teacher because	Strongly Disagree	Disagree	Agree	Strongly agree
1. I have always wanted to be a teacher	1	2	3	4
2. I want to share my knowledge of a subject	1	2	3	4
3. I see it as a step to further study	1	2	3	4
4. I couldn't get into my first choice of study	1	2	3	4
5. I want to work in a respected profession	1	2	3	4
6. I was inspired by teachers who taught me	1	2	3	4
7. I think teaching is easier than most other jobs	1	2	3	4
8. I would like to help improve the quality of education in SA	1	2	3	4
9. I want job security and a way of supporting my family	1	2	3	4
10. I received a teaching bursary	1	2	3	4
11. I didn't really know what other job to do	1	2	3	4
12. I like working with children	1	2	3	4
13. I would like a job that will give me opportunities work in other countries	1	2	3	4
14. I like the holidays and working hours	1	2	3	4

35. Please state whether you agree or disagree with the following statements relating to how you feel about the **Funza Lushaka bursary**?

Section trigger: None

Interviewer notes: Single mention

	Agree	Disagree
1. Receiving Funza Lushaka funding has assisted me in pursuing a worthwhile degree in teaching	1	2
2. The bursary assistance I received help me successfully complete all the required academic activities for my degree	1	2
3. The bursary influenced my subject specialisation choices	1	2

	Agree	Disagree
4. I will make positive changes in the priority areas of under resourced schools as a result of the bursary	1	2
5. I look forward to teaching in rural schools	1	2
6. It is important to work in public schools to fulfil my obligatory service period	1	2
7. I intend to leave the teaching profession once I complete my obligation to the bursary programme	1	2
8. I believe I am making a meaningful contribution to the profession	1	2
9. I am worried about the poor social status attached to the teaching profession	1	2
10. I am proud of being a Funza Lushaka recipient	1	2

36. Do you feel that your qualification has prepared you assessing student learning? Please rate on a scale of 1 to 4 where 1 is "not prepared at all", 2 is "somewhat prepared", 3 is "prepared" and 4 is "very well prepared"

Section trigger: None

Interviewer notes: Single mention

Not at all prepared	Somewhat prepared	Prepared	Very well prepared
1	2	3	4

37. Do you feel confident in assessing student learning in order to improve student performance Please rate on a scale of 1 to 4 where 1 is "not confident at all", 2 is "somewhat confident", 3 is "confident" and 4 is "very confident"

Section trigger: None

Interviewer notes: Single mention

Not at all confident	Somewhat confident	Confident	Very confident
1	2	3	4

Section G: Accountability

Only ask section to those who have graduated in Q6.

We would like to find out about the success of the placement process and the bursary administration in the questions which follow. None of this information is in anyway related to NSFAS's recovery of funds.

38. If you have finished studying, what are you doing to fulfil your obligation to **Funza Lushaka**?
How are you repaying Funza Lushaka for the bursary you received?

Section trigger: Only ask if graduated selected in Q6.

Interviewer notes: Single mention. Read Out.

Paid/Paying back in service (i.e. you are working at a school to	1	Skip to Q40
--	---	-------------

pay back the bursary)		
Paid/Paying back financially (i.e. the bursary has been converted to a loan, paying money in monthly instalments)	2	Continue to Q39
I am not paying it back (i.e I have been declared breach of contract)	3	Continue to Q39
I am still awaiting placement	4	Continue to Q39
I have been released from my service obligation	5	Continue to Q39
Other (please specify)	6	Continue to Q39

39. **If you are not in service, has anyone followed up on whether or not you have paid back your bursary?**

Section trigger: Only ask if graduated selected in Q6.

Interviewer notes: Single mention

No	Yes	Refuse to answer
1	2	77

Section H: Graduation, placement and effects of non-placement

Only for those who dropped out or graduated

I would like to now ask you about the placement process in order to understand where problems arise in the process and how these challenges could be addressed.

40. **Are you currently employed?**

Section trigger: If yes, continue to Q42. If no, continue to Q41 and then end interview.

Interviewer notes: Single mention

No	Yes
1	2
Continue to Q41, then End Interview	Continue to Q42

41. **In terms of your placement not being successful, which part of the system would you say was not functioning effectively in order to ensure your placement?**

If you were not placed or did not take up placement, what were the reasons?

Section trigger: Only ask if no in Q40, then move to Biographic information and terminate interview.

Interviewer notes: Multiple Mention

	Tick if yes
Student- I did not complete forms on time	1
Student- I did not submit documentation on time	2
The universities in their role of providing graduation information	3
The provincial office in its role of communicating suitable vacancies for graduate	4
The provincial office in its role of communicating with schools about what teachers they require	5
The district office in its role of informing schools of available graduates	6
The school in its role of requesting teachers for the correct priority areas	7
The SGB in its role of approving placement of suitable candidates	8
The DBE's role in confirming completion of qualification by graduates	9

42. Are you employed as a teacher?

Section trigger: If yes, continue to Q43. If no skip to Q46

Interviewer notes: Single Mention

No	Yes
1	2
<i>Skip to Q46</i>	<i>Continue to Q43</i>

43. Did you start teaching in a school immediately after graduation (start of the next school year)?

if you did take up a teaching position, how soon after the year you graduated did you start teaching?

Section trigger: Only ask if yes in Q42

Interviewer notes: Single Mention

No	Yes within 60 days	Yes but not in 60 days	Refuse to answer
1	2	3	77
<i>Skip to Q45</i>	<i>Continue to Q44</i>	<i>Continue to Q44</i>	<i>Skip to Q45</i>

44. How were you placed in this position

Section trigger: Only ask if Yes in Q42 and Q43

Interviewer notes: Single Mention

Through the provincial placement database of my first choice of	1	
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province		
Through Funza Lushaka and the province in a province not of my choosing	2	
Application through a newspaper advertisement	3	In Q45 do not ask option 3,6 or 7 in Q45
Through a recruitment agency	4	
Directly by the school	5	
By the district office	6	
Other (specify):	7	In Q45 do not ask option 3,6 or 7 in Q45

45. Indicate whether you agree or disagree with the following statements?

Section trigger: Only ask if yes in Q42

Interviewer notes: Single Mention

	Agree	Disagree
The Funza Lushaka placement form is simple to understand and complete	1	2
I experienced difficulties with placement	1	2
The school principal was happy with my placement at the school	1	2
The provincial office was helpful in getting me placed at a school	1	2
The district offices were involved in the placement process	1	2
I was inducted and orientated at the school at which I was placed	1	2
I received support and mentoring when I first arrived at the school	1	2

46. If you were not placed: What alternatives have you opted for in light of non-placement or delay in placement?

Section trigger: Only ask if no in Q42

Interviewer notes: Single Mention

Looked for a job myself	1
Went into a different career in which I could find work	2
Took up a position in a school outside of placement process	3
Approached a recruitment agency for assistance	4

Other (specify)	5
N/A Was not placed	77

47. If you are not employed as a teacher where are you working?

Section trigger: Only ask if no in Q42

Interviewer notes: Multiple Mention

Non-teaching position in education department	1
Government department	2
NGO/NPO sector	3
Business sector	4
Self-employed/own business	5
Training or lecturing at FET (TVET) college	6

Section I: Employment Detail

48. If employed at a school provide name, EMIS number, province, address and district of the school?

Section trigger: Only ask if yes in Q42. At the EMIS number make provision for Don't know, a 6 or a 9 digit number please

Interviewer notes: Capture response. For the EMIS number you may capture Don't Know. The number may be a 9 or a 6 digit number.

Name	National EMIS Number	Province	Physical address	District
		Eastern Cape		Butterworth
				Cofimvaba
				Cradock
				Dutywa
				East London
				Fort Beaufort
				Graaf-Reinet
				Grahamstown
				King Williams Towns
				Lady Frere
				Libode

				Lusikisiki
				Maluti
				Mbizana
				Mthatha
				Mt Fletcher
				Mt Frere
				Ngcobo
				Port Elizabeth
				Queenstown
				Qumbu
				Sterkspruit
				Uitenhage
		Free State		Thabo Mofutsanyana
				Fezile Dabi
				Lejweleputswa
				Motheo
				Xhariep
		Gauteng		Sedibeng West
				Ekurhuleni North
				Ekurhuleni South
				Gauteng East
				Sedibeng East
				Johannesburg South
				Johannesburg West
				Johannesburg East
				Johannesburg North
				Johannesburh Central
				Gauteng North
				Gauteng West

				Tshwane North
				Tshwane South
				Tshwane West
		KwaZulu Natal		Othukela
				Sisonke
				Umzinyathi
				Umgungudlovu
				Ilembe
				Pinetown
				Ugu/Port Shepstone
				Umlazi
				Umkhanyakude
				Amajuba
				Uthungulu
				Zululand
		Limpopo		Capricorn
				Lebowakgomo
				Greater Sekhukhune
				Riba Cross
				Mopani
				Tzaneen
				Vhembe
				Mutale
				Waterberg
				Mogalakwena
		Mpumalanga		Ehlanzeni
				Nkangala
				Gert Sibande
				Bohlabela

		North West		Bojanala
				Dr Ruth Segomotsi Mompoti
				Ngaka Modiri Molema
				Dr Kenneth Kaunda
		Northern Cape		Frances Baard
				Springbok: Namaqua
				De Aar: Pixley-Ka-Seme
				John Taolo Gaetsewe
				ZF Mgcawu
		Western Cape		Eden/Karoo
				Cape Winelands
				Metro.-East
				Metro.-Central
				Overberg
				Metro.-North
				West Coast
				Metro.-South

49. If employed at a school is it a public/government or private/independent school?

Section trigger: Only ask if Yes in Q42. If public school in Q49, continue to Q50. If no in Q49, skip to Q51

Interviewer notes: Capture response

Public /government school	1	<i>Continue to Q50</i>
Private / independent school	2	<i>Skip to Q51</i>

50. Are you employed in a state paid or SGB position?

Section trigger: Only ask if Yes in Q42. Only ask if Public school in Q49.

Interviewer notes: Single mention

State paid	SGB(school governing body)	Refuse to answer
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1	2	77
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51. Are you employed in a permanent or, temporary position?

Section trigger: Only ask if Yes in Q42

Interviewer notes: Single mention

Permanent	Temporary	Refuse to answer
1	2	77

52. What grades do you currently teach?

Section trigger: Only ask if Yes in Q42

Interviewer notes: Multiple mention

Grade R	1
Grade 1	2
Grade 2	3
Grade 3	4
Grade 4	5
Grade 5	6
Grade 6	7
Grade 7	8
Grade 8	9
Grade 9	10
Grade 10	11
Grade 11	12
Grade 12	13

53. What subjects do you currently teach?

Section trigger: Ask question for each grade selected in Q52. Only ask if Yes in Q42.

Interviewer notes: Multiple mention

Mathematical Literacy	1	Mathematics	24
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Life Orientation	2	Agricultural Management Practices	25
Agricultural Sciences	3	Agricultural Technology	26
Dance Studies	4	Design	27
Dramatic Arts	5	Music	28
Visual Arts	6	Accounting	29
Business Studies	7	Economics	30
Civil Technology	8	Geography	31
Electrical Technology	9	History	32
Mechanical Technology	10	Computer Applications Technology	33
Engineering Graphics and Design	11	Information Technology	34
Consumer Studies	12	Life Sciences	35
Hospitality Studies	13	Physical Sciences	36
Tourism	14	Setswana	37
isiNdebele	15	Sesotho	39
isiXhosa	16	Siswati	40
isiZulu	17	Tshivenda	41
Sepedi	18	Xitsongo	42
Natural Sciences	19	Economic Management Sciences	43
Social Sciences	20	Creative Arts	44
Technology	21	Religion Studies	45
Natural Sciences and Technology	22	Life Skills	46
Social Sciences	23	FP subjects	47
Refuse to answer	77	Afrikaans	48
		English	49
Other (specify):			

54. **Would you have studied teaching if you did not receive the **Funza Lushaka** bursary?**

Section trigger: Can ask for those who graduated and dropped out.

Interviewer notes: Single Mention

No	Yes	I don't know	Refuse to answer
1	2	3	77

55. **For how long do you want to remain within the teaching profession?**

Section trigger: Can ask for those who graduated and dropped out.

Interviewer notes: Single Mention

Until I complete my service obligation	Less than 5 years	5-10 years	10-15 years	Entire professional career
1	2	3	4	5

Closing

Thank you for your participation in the survey. The DBE appreciates your feedback and wishes you all the best in your career.

Student Focus Group Schedule

This instrument is designed to be used for student focus groups of current Funza Lushaka bursary recipients at universities. Their details must be captured below for record purposes. The information in the boxes below must be shared with all interview participants upfront.

PURPOSE OF THE FOCUS GROUP

JET has been appointed to evaluate the implementation of the FLBP for the period 2007 – 2012. This interview forms part of a set of key stakeholder interviews. The purpose of the interview is to explore your thoughts and experiences in relation to the FLBP, specifically, the achievements and constraints of the programme design and implementation and what you see as successes and lessons learnt. I will be asking you structured questions in this interview to guide our conversation. By participating in this interview you will be contributing to the overall development of the FLBP, as the evaluation will provide formative feedback on the operations of the FLBP between 2007 and 2012.

CONFIDENTIALITY

Information you provide in this interview is strictly confidential. No names will be used in reporting research findings. Quotes will be anonymous and general themes will be reported on. The interview is a safe environment for you to share your perceptions and experience. The interview is being recorded. This is essential so that the researcher is able to refer to an audio recording when writing up their interview notes and will serve as a formal record that the interview took place. It does not, however, take away from the confidentiality of the process. Thank you for taking the time to be interviewed.

Interviewer:		Date of interview:		
Start time of interview:		End time of interview:		

Reflect briefly below on the interview, your notes will assist the data analysis team to interpret contextual and other factors which may influence the data

Notes on the interview

Were any difficulties encountered in arranging the interview?
 Were you able to build rapport with the respondent(s)? Why or why not?
 Was the interview disturbed or interrupted?
 Did the group seem comfortable with in the interview? comment on the group dynamic.
 Were there any questions which the respondent(s) did not answer or was reluctant to answer? If so which were these?
 Do you feel that the respondents were open and honest and answered the questions to the best of their ability?
 Were the respondents in a hurry to complete the interview?
 Were you able to cover all relevant questions?
 Do you feel that anything important was left unsaid?

Student information Sheet

Name and Surname:

Email address and contact number:

Academic programme and year of study (e.g. B.Ed, 3rd Year):

Phase of specialisation:

Foundation Phase	1
Intermediate Phase	2
Foundation and Intermediate Phase (FP/IP)	3
Senior Phase	4
Intersen Phase (IP/SP)	5
FET	6
Senior and Further Education and Training (SP/FET)	7
Have not yet chosen	8
Other: Specify	9
Refuse to answer	77

Subject specialisation (e.g. Mathematics, Life Sciences):

What are your reasons for selecting the areas of specialisation which you have chosen?

For how many years did you receive Funza Lushaka funding?

Warm up and Objectives (5min)

1. What has been the highlight (the best thing) about being a Funza Lushaka bursary recipient

2. Do you believe this is a worthwhile bursary programme?

Recruitment (15min)

3. What strategies did FL use in order to inform you about the programme? And were these strategies effective?

Prompts: How did you get into the programme? Who assisted you? Did you hear about it through the district or online campaign and how effective were these mechanisms? What worked well and what did not work in terms of the recruitment (marketing and advertising)?

Application (5min)

4. Did you get enough information about how to apply to FL for the bursary? How did you apply to the programme (districts or online)?

Prompts: Who assisted you with application? Did the districts or schools or universities assist? Is the bursary application aligned with university applications (suitable in terms of the university open and closing dates)? What worked well and what did not work in the applications process?

Selection (5min)

5. Do you know what the selection criteria for the bursary are? What are your views of the selection criteria?

Prompts: Were you given enough information to understand the criteria? Do you think the selection criteria are applied in a fair and consistent way? How long after applying did you have to wait for a decision? What worked well and what did not work in terms of the recruitment (marketing and advertising)?

Management and administration (5 min)

6. Have you ever been contacted by anyone in relation to the bursary during the time you have been studying?

Prompts: Who contacted you? Who do you contact when you need information or assistance? Is the communication and notification adequately managed? What works well and what does not work well in the way the bursary is managed and administered?

Funding arrangements (15 min)

7. Tell me about the bursary funding arrangements? When does the money get paid out?

Prompts: How long does it take to get information about when funds will be paid? How is it communicated? Have you ever applied for other bursaries while waiting for a decision about your funding? Is there ever a gap between the time university starts and the funds get paid? What did you do during that gap period to cover expenses?

8. How is the bursary money spent?

Prompts: Does the bursary sufficient enough cover all your requirements (tuition, food, accommodation, travel and books)? Where there surplus funds? How was the surplus funds used? What necessities does the bursary not cover (teaching practical expenses, laptops etc.)?

9. What works well and what does not work well in terms of the funding arrangement?

Prompts: Do you think that the bursary is a good incentive? Are there other bursary schemes which you think are better? If yes, why?

Placement (15min)

10. Do you have any views on where you would like to be placed?

Prompts: Which phases and subjects would you want to teach when you are placed at a school? What kind of school would you like to be placed in? Have you visited schools which are under-resourced? What kinds of schools have you been to for your practical teaching? How did you feel about teaching in these schools (are you being prepared for this)?

Recipient attitudes to bursary conditions (10min)

11. What are your views about the conditions of the bursary? Were the bursary terms and conditions made explicit to you?

Prompts: Did you receive any information about the bursary wanting recipients to go back to teach in the districts they come from? How do you feel about possibly working in an under-resourced school? How do you feel about possibly working in a rural school? If offered a place in an under-resourced or rural school would you decline? How do you feel about paying back the bursary through service for one year for each year of funding? Is it fair?

Stakeholder Perceptions (35min)

12. Is teaching your first choice as a profession?

13. What do you think about the FLBP? Are you proud of being a bursary recipient? Is it a good way to get people interested in the teaching profession?

14. Do you think the bursary motivates you to complete your studies in the prescribed time?

15. Do you think that the bursary is a good incentive? Are there other bursary schemes which you think are better? If yes, why?

16. If offered an alternative would you prefer an alternative bursary with no obligation to work back for the years?

17. What do you like about the programme?

18. What do you dislike about the programme?

General (10min)

19. Do you think you will remain a teacher? Why or why not? Would you remain in an education related field? What do you think it about the reputation or social status of the profession?

DBE/DHET Interview schedule

This instrument is designed to be used with DBE and DHET officials involved in the management, coordination and administration of the FLBP. Relevant officials should be interviewed individually. Some sections of the interview guide will not be relevant to the programme role and responsibilities of the individual being interviewed. You should only ask questions in sections which are relevant.

INTRODUCTION

JET has been appointed to evaluate the implementation of the FLBP for the period 2007 – 2012. This interview forms part of a set of key stakeholder interviews. The purpose of the interview is to explore your thoughts experiences in relation to the FLBP, specifically, the achievements and constraints of the programme design and implementation and what you see as successes and lessons learnt. I will be asking you structured questions in this interview to guide our conversation.

CONFIDENTIALITY

Information you provide in this questionnaire is strictly confidential. No names will be used in reporting research findings. Quotes will be anonymous and general themes will be reported on. The interview is a safe environment for you to share your perceptions and experience. Thank you for taking the time to be interviewed.

Interviewer:		Date of interview:	
Start time of interview:		End time of interview:	
Name of person(s) being interviewed		Designation (current occupational role)	
Role on the FLBP		Length of involvement in the FLBP programme (yr)	
Interviewee contact details			

Reflect briefly below on the interview, your notes will assist the data analysis team to interpret contextual and other factors which may impact on the data

Notes on the interview

Were any difficulties encountered in arranging the interview?
 Were you able to build rapport with the respondent(s)? Why or why not?
 Was the interview disturbed or interrupted?
 If more than one person was interviewed together, did they seem comfortable with this arrangement or not?
 Were there any questions which the respondent(s) did not answer or was reluctant to answer? If so which were these?
 Do you feel that the respondent(s) were open and honest and answered the questions to the best of their ability?
 Was the respondent(s) in a hurry to complete the interview?
 Were you able to cover all relevant questions?
 Do you feel that anything important was left unsaid?

If you have limited time for the interview allocate your time in the following way: Responsibilities 2%, stakeholder relations 6%, recruitment 10%, selection 20%, awarding and disbursement 20%, placement 20%, management, administration, coordination and monitoring 10% , addressing real needs 6%, sustainability and general questions 6%.

Responsibilities in relation to the programme

1. What are your responsibilities in relation to the FLBP?
2. What activities do you undertake to do that?

Stakeholder relations

3. Who are the main stakeholders that you interact with in relation to FLBP and how often do you interact with them?
 - a. PEDs
 - b. HEIs
 - c. NSFAS
 - d. Treasury
 - e. Other
2. Is there an MoU with NSFAS? If yes what does it cover?
 - a. Disbursement of funds
 - b. Recovery of funds
 - c. Reporting requirements
4. Would you describe your relationships with these stakeholders as strong/good or weak/poor? And please explain why.
 - a. PEDs
 - b. HEIs
 - c. NSFAS
 - d. Treasury
 - e. Other as described above
5. How can these relationships (outlined above) be strengthened and improved?

Recruitment process

6. How is the FLBP marketed and promoted (advertised)?
 - a. Are you successful in reaching the young people from rural areas and disadvantaged backgrounds?
7. What marketing materials are available?
 - a. Are these widely distributed and used?
 - b. Probe why or why not.
8. How does the FLBP **recruitment** process work and what are the timeframes relating to this?
 - a. Prompt using the FLBP business process diagram, compare how it works to the FLBP recruitment business process diagram and note any differences.
9. What is working well in terms of recruitment?
10. What are the problem areas in terms of recruitment?
11. How could the recruitment process be improved?

Selection process

12. How does the FLBP selection process work and what are the timeframes relating to this?
 - a. Prompt using the FLBP business process diagram, compare how it works to the FLBP selection business process diagram and note any differences.
 - b. District-based.
 - c. At HEIs.
 - d. Are there any provincial or other variations?
13. What criteria are used to select FLBP bursars?
 - a. Are there any provincial or other variations in how the selection criteria are applied?
 - b. Are there any specific issues/challenges relating to application of the FLBP selection criteria?
14. What is working well in terms of selection?
15. What are the problem areas in terms of selection?
 - a. Are there any specific issues/challenges relating to the DBE's involvement in selection?
16. How could the selection process be improved?

Awarding and disbursement process

17. How does the awarding and disbursement process work and what are the timeframes relating to this?
 - a. Prompt using the FLBP business process diagram, compare how it works to the FLBP awarding and disbursement business process diagram and note any differences.
18. What proportion of the FLBP bursars are: re-awards, district-based and national awards?
 - a. What have been the trends in this regard between 2007-2012?
19. Are there variances relating to awarding and disbursement at different HEIs?
 - a. What accounts for the variance in tuition fees?
 - b. Do fee variances impact on selection at specific institutions (e.g. if the fees are high fewer students can be covered)?
 - c. Are you aware that fees for education programmes have increased since the introduction of the FLBP?
 - d. Are you aware of a spike in tuition fees at some institutions (i.e. CUT and UniVEN) where the main inflow is FLBP bursars?
 - e. How are distance learning students managed (i.e. at UNISA and UNW)? Is there a different process and length of time for graduation?
 - f. How are student allowances determined? Is there a ceiling amount?
 - g. What happens to unspent FLBP funds? What process is followed to recover them?
20. What is working well in terms of awarding and disbursement?
21. What are the problem areas in terms of awarding and disbursement?
 - a. Probe in relation to the role of NSFAS

22. How could the awarding and disbursement process be improved?

Placement process

23. How does the placement process work and what are the timeframes relating to this?
- Prompt using the FLBP business process diagram, compare how it works to the FLBP placement business process diagram and note any differences.
 - How are school/curriculum teacher needs identified and matched against graduates areas of specialisation?
24. Which provinces are most popular for FLBP graduates to request to be placed in?
25. Which provinces are able to place all/most FLBP graduates and which are not – why is this?
26. How effective – or not – is the mechanism for placing FLBP graduates who cannot be placed in their province of first choice?
27. Is the placement period for graduates (60 days) realistic?
28. What happens to FLBP graduates that are not placed within 60 days?
- Are there issues relating to the relinquishment of the service obligation if bursars are not placed within 60 days?
29. What actions are taken (and by whom) in the case of students who are:
- a) not placed in a school;
 - b) decline to be placed in a school;
 - c) leave the country?
30. What monitoring and tracking processes are in place for students who received the FL bursary but not in their final year?
31. Have there been any recoveries of bursary funds from students?
- What is the quantum?
32. What is working well in terms of placement?
33. What are the problem areas in terms of placement?
34. How could the placement process be improved?
35. How could the tracking of students be improved?
36. How could the management of defaulters be improved?

Management, administration, coordination and monitoring

37. Is the FLBP adequately managed and coordinated overall and by specific stakeholders?
- DBE
 - DHET
 - PEDs
 - Districts
 - NSFAS
 - HEIs
38. Is there sufficient human capacity in place to implement the FLBP key business processes (recruitment, selection, awarding and disbursement and placement)?
- DBE
 - DHET

-
- c. PEDs
 - d. Districts
 - e. NSFAS
 - f. HEIs
39. Are there adequate/sufficient systems in place to support the FLBP business processes?
40. What monitoring data is kept in relation to the FLBP by the following stakeholders?
- a. DBE
 - b. DHET
 - c. PEDs
 - d. Districts
 - e. HEIs
 - f. NSFAS
41. What monitoring data do you need to execute your role and fulfil your responsibilities in relation to the FLBP?
- a. Are you able to access this data?
 - b. What is the data quality like?
 - c. How is this monitoring data used?
42. What is working well in relation to:
- a. Management
 - b. Administration
 - c. Coordination
 - d. Monitoring
43. What are the problem areas in relation to:
- a. Management
 - b. Administration
 - c. Coordination
 - d. Monitoring
44. How could/should the FLBP management, administration, coordination and monitoring systems be strengthened?

Need for the programme

45. Is the FLBP helping to address teacher supply needs in South Africa?
- a. Why do you say this?
46. How are the FLBP priority areas identified?
- a. Who is involved in this process?
 - b. How often are the priority areas updated?
47. Are the subject and phase specialisations of the FLBP graduates aligned with the country's needs?
48. Are FLBP graduates assigned to geographic areas of need?
49. Do you have any suggestions as to how the FLBP could better address the teacher supply needs?

Sustainability and general questions

-
50. Is the treasury allocation sufficient to achieve the FLBP objectives?
 51. Do you feel the FLBP is efficient – is the programme achieving value for money?
 - a. If yes or no, why do you say this?
 52. Do you feel the FLBP is effective – is the programme on track to achieve its goal and objectives?
 - a. If yes or no, why do you say this?
 53. Is there any evidence to suggest that the FLBP will achieve the desired impact (increased supply of quality teachers in priority areas)?
 54. Do you feel the FLBP is a sustainable programme?
 - a. If yes or no, why do you say this?
 - b. Probe about funding, business processes, human resources and partnerships.
 55. How could the FLBP be improved/strengthened?

National Student Financial Aid Scheme (NSFAS) officials Interview schedule

This instrument is designed to be used with NSFAS officials involved in the Funza Lushaka Bursary Programme (FLBP). Relevant officials can be interviewed together or separately and their details captured below.

INTRODUCTION

JET has been appointed to evaluate the implementation of the FLBP for the period 2007 – 2012. This interview forms part of a set of key stakeholder interviews. The purpose of the interview is to explore your thoughts and experiences in relation to the FLBP, specifically, the achievements and constraints of the programme design and implementation and what you see as successes and lessons learnt. I will be asking you structured questions in this interview to guide our conversation.

CONFIDENTIALITY

Information you provide in this questionnaire is strictly confidential. No names will be used in reporting research findings. Quotes will be anonymous and general themes will be reported on. The interview is a safe environment for you to share your perceptions and experience. Thank you for taking the time to be interviewed.

Interviewer:		Date of interview:	
Start time of interview:		End time of interview:	
Name of person(s) being interviewed		Designation (current occupational role)	
Role on the FLBP		Length of involvement in the FLBP programme (yr)	
Interviewee contact details			

Reflect briefly below on the interview, your notes will assist the data analysis team to interpret contextual and other factors which may influence the data

Notes on the interview

Were any difficulties encountered in arranging the interview?

Were you able to build rapport with the respondent(s)? Why or why not?

Was the interview disturbed or interrupted?

If more than one person was interviewed together, did they seem comfortable with this arrangement or not?

Were there any questions which the respondent(s) did not answer or was reluctant to answer? If so which were these?

Do you feel that the respondent(s) were open and honest and answered the questions to the best of their ability?

Was the respondent(s) in a hurry to complete the interview?

Were you able to cover all relevant questions?

Do you feel that anything important was left unsaid?

If you have limited time for the interview allocate your time in the following way: Role in relation to the programme 5%, stakeholder relations 10%, awarding and disbursement 40%, recovery 20%, management, administration, coordination and monitoring 12% , sustainability and general questions 13%.

Role in relation to the programme

1. Who at NSFAS is involved in administering the FLBP bursary and how do the different NSFAS functions relate to each other?
 - a. How many people work on the FLBP at NSFAS? Who are they and what are their roles?
2. What are the key activities undertaken by you and your staff to administer the FLBP bursary?
3. Approximately what amount of your time is allocated to the FLBP bursary management?

Stakeholder Relations

4. Who are the main stakeholders that you interact with in relation to FLBP and how often do you interact with them?
 - a. DBE
 - b. HEIs
 - c. Treasury
 - d. Other
5. Would you describe your relationships with these stakeholders as strong/good or weak/poor?
 - DBE
 - HEIs
 - Treasury
 - Other as described above
6. How can these relationships (outlined above) be strengthened and improved?
7. What challenges have been faced – if any - in the coordination of the FLBP between the NSFAS and the other stakeholders?

Awarding and disbursement process

8. How does the awarding and disbursement process work and what is NSFAS' role in this?
 - a. Prompt using the FLBP business process diagram, compare how it works to the FLBP awarding and disbursement business process diagram and note any differences.
 - b. How is NSFAS notified about FLBP bursars – Do they receive a consolidated list sorted by institution? Is notification the same for pilot and non-pilot institutions?
 - c. How does NSFAS ensure that there is alignment and agreement between the DBE and HEIs final award list that they receive?

-
- d. Describe the internal processes that commences once NSFAS is notified.
 - e. What documents do HEIs need to submit to NSFAS on behalf of students they are claiming for?
 - f. Probe in terms of HEI claims – what do they claim for. Does the claim specify per student tuition, accommodation, books, etc; or does it only indicate total claim for per student?
 - g. Probe in relation to the disbursement of FLBP funds to HEIs – when and how does this happen?
 - i. Is there a HEI claim list for funded students?
 - ii. Is it once off to cover all costs for the year? (explain the process).
 - h. Does NSFAS receive financial statements from HEIs indicating amounts disbursed to individual students? when and how does this happen?
 - i. Probe in relation to submitting the audited financial statements to the DBE.
9. Does the awarding and disbursement process differ in relation to different HEIs?
- Discuss whether these are some institutions that perform better in relation to the submission of claims
 - Whether the processing of funds and disbursement of funds to students is the same in all the HEIs.
 - Discuss HEI's where a new process is being piloted (UNIVEN UNISA, NMMU, DUT Sol Plaatje and Mpumalanga) and what this involves.
 - Are there any lessons from the institutions participating in the pilot with specific reference for the FLBP?
10. Please discuss the efficiency of FAOs to process and disburse bursary claims.
11. Please discuss the efficiency of NSFAS to process and disburse bursary claims.
12. What steps – if any - have been taken by the NSFAS to improve the processing and disbursement procedures of the FLBP?
13. What is working well in terms of the awarding and disbursement process?
14. What are the problem areas in terms of the awarding and disbursement process?
- Discuss the delays in disbursement of funds (reasons for this).
15. How could the awarding and disbursement business process be improved?

Recovery process (part of placement)

16. Does NSFAS have a system in place to track students that receive the FLBP in one year and then not in the next (or not in their final year)?
17. What information does NSFAS require in order to be able to track students and recover monies from students that opt not to be placed?

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- a. Elaborate on the information and actions required of students during their final year of study and the processes to receive this data.
 - b. -Discuss obligations to provide information to the DBE.
18. Is the placement period for graduates (60 days) realistic, or does it create challenges for NSFAS? If so, what are those challenges?
 19. In what instances is a bursary converted into a loan?
 20. Does the DBE notify NSFAS of defaulters or students who are to pay back the bursary?
 - a. Discuss when this happens.
 21. What happens when a bursary is converted into a loan?
 - a. Discuss what steps are involved in the conversion of a bursary to a loan.
 - b. Ask NSFAS to describe instances when this has occurred.
 22. How does NSFAS go about recovering funds from students that decide not to accept a placement?
 - a. Probe in relation to the electronic statement notification technology used to communicate with NSFAS debtors.
 - b. Discuss what challenges if any they may have faced in reaching all their debtors.
 - c. If student commence paying, are these funds accounted for to the DBE? How?
 23. Does NSFAS have a database of defaulters and a debt tracking system?
 24. How does the recovery system work?
 25. What challenges have been experienced with regard to the retrieval of funds from FLBP graduates that decide not to be placed?
 26. What is the repayment rate of FLBP recipients in relation to other loan recipients?
 27. What is working well in terms of the recovery process?
 28. What are the problem areas in terms of the recovery process?
 29. What steps – if any - have been taken by the NSFAS to improve the recovery procedures?
 30. How could the placement and recovery business process be improved?

Management, administration, coordination and monitoring

31. In your opinion, is the FLBP adequately managed and coordinated overall?
32. Are there adequate/sufficient systems in place to support the FLBP business processes?
33. Is there effective communication between all the role players that you interact with?
 - a. Discuss challenges they have experienced.
 - b. Discuss how communication processes can better be coordinated.

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34. Is NSFAS able to fulfill their mandate and responsibilities in relation to the FLBP adequately?
- Role in the administration of the programme.
 - Performance of functions in line with the agreements entered between NSFAS and the students.
 - Recovery of funds from defaulters.
 - Reporting requirements.
35. What are the challenges that have been faced in performing the various NSFAS functions? (Discuss these challenges as well as the steps that may have been taken to address these challenges).
36. To what extent have training and support interventions been delivered to enable HEIs to better utilize the FLBP funds allocated to them? (NSFAS has this as one of its objectives in order to improve bursary management)
- Discuss what training if any has been delivered to HEI's and to whom.
 - Discuss the extent to which the training has been effective.
37. What monitoring data do you need to execute your role and fulfil your responsibilities in relation to the FLBP?
- d. Are you able to access this data?
 - e. What is the data quality like?
 - f. How is this monitoring data used?
38. NSFAS is expected to submit quarterly reports to the DBE as well as an annual audited statement. Are any challenges experienced in relation to reporting?

Sustainability and general questions

39. Does NSFAS administer any other government bursaries?
- a. Are there lessons that can be drawn from the administration of other bursary schemes as good practice for the FLBP?
40. How are the allowances and amounts per institution determined?
41. Do you feel the FLBP is efficient – is the programme achieving value for money?
- If yes or no, why do you say this?
42. Do you feel the FLBP is effective – is the programme on track to achieve its goal and objectives?
- If yes or no, why do you say this?
43. Do you feel the FLBP is a sustainable programme?
- If yes or no, why do you say this?
 - Probe about funding, business processes, human resources and partnerships.
44. What are the key recommendations that NSFAS would make to improve the administration and management of the bursary programme?

Provincial Recruitment and Placement Interview schedule

This instrument is designed to be used with provincial officials responsible for recruitment and placement of FLBP bursars and graduates. Relevant officials can be interviewed together or separately and their details captured below.

INTRODUCTION

JET has been appointed to evaluate the implementation of the FLBP for the period 2007 – 2012. This interview forms part of a set of key stakeholder interviews. The purpose of the interview is to explore your thoughts and experiences in relation to the FLBP, specifically, the achievements and constraints of the programme design and implementation and what you see as successes and lessons learnt. I will be asking you structured questions in this interview to guide our conversation.

CONFIDENTIALITY

Information you provide in this questionnaire is strictly confidential. No names will be used in reporting research findings. Quotes will be anonymous and general themes will be reported on. The interview is a safe environment for you to share your perceptions and experience. Thank you for taking the time to be interviewed.

Interviewer:		Date of interview:	
Start time of interview:		End time of interview:	
Name of person(s) being interviewed		Designation (current occupational role)	
Role on the FLBP		Length of involvement in the FLBP programme (yr)	
Interviewee contact details			

Reflect briefly below on the interview, your notes will assist the data analysis team to interpret contextual and other factors which may influence the data

Notes on the interview

Were any difficulties encountered in arranging the interview?
 Were you able to build rapport with the respondent(s)? Why or why not?
 Was the interview disturbed or interrupted?
 If more than one person was interviewed together, did they seem comfortable with this arrangement or not?
 Were there any questions which the respondent(s) did not answer or was reluctant to answer? If so which were these?
 Do you feel that the respondent(s) were open and honest and answered the questions to the best of their ability?
 Was the respondent(s) in a hurry to complete the interview?
 Were you able to cover all relevant questions?
 Do you feel that anything important was left unsaid?

If you have limited time for the interview allocate your time in the following way: Background 5%, stakeholder relations 10%, recruitment 20%, selection 20%, placement 25%, management, administration, coordination and monitoring 10% , addressing real needs 10%.

Background and responsibilities in relation to the programme

1. What are your responsibilities in relation to the FLBP?
2. What are the key activities undertaken by you and your staff to do that?
3. Does your province offer any other bursary schemes aimed at teacher education, or did you used to?
 - a. If a teacher education bursary programme was in place between 2007 and 2012 when and why was it stopped?

Stakeholder relations

4. Who are the main stakeholders you interact with in relation to the FLBP and how often do you interact with them?
 - e. DBE
 - f. HEIs
 - g. Districts
 - h. Other
5. Would you describe your relationships with these stakeholders as strong/good or weak/poor? And why is this?
 - a. DBE
 - b. HEIs
 - c. Districts
 - d. Other as described above
6. How can these relationships (outlined above) be strengthened and improved?

Recruitment process

7. How is the FLBP marketed and promoted (advertised) in your province?
 - a. Probe in relation to district-based recruitment.
 - b. Are you successful in reaching the young people from rural areas and disadvantaged backgrounds?
8. How does the FLBP recruitment process work in your province and what are the timeframes relating to this?
 - a. Prompt using the FLBP business process diagram, compare how it works to the FLBP recruitment business process diagram and note any differences.
 - b. Does the Province prepare a management plan and report quarterly to the DBE in relation to this? Is the management plan communicated to districts and school principals?
9. What is working well in terms of recruitment?
10. What are the problem areas in terms of recruitment?
11. How could the recruitment process be improved?

Selection process

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12. How does the selection process work in your province and what are the timeframes relating to this?
 - a. Probe in relation to district-based recruitment in particular.
 - b. At HEIs.
 - c. Probe in relation to the issuing of promissory letters²⁰.
 - d. Prompt using the FLBP business process diagram, compare how it works to the FLBP selection business process diagram and note any differences.
 13. What criteria are used to select FLBP bursars?
 - a. District-based recruitment.
 - b. Recruitment at HEIs.
 14. What is working well in terms of selection?
 15. What are the problem areas in terms of selection?
 16. Are there cases where district-based awardees do not apply for or gain admission to an HEI? If so, please explain what happens in these situations?
 17. How could the selection processes in your province be improved?

Placement process

18. How are school/curriculum teacher needs identified in your province?
19. How does the placement process for FLBP graduates work in your province and what are the timeframes relating to this?
 - a. When do you receive the placement database from the DBE? Does the database contain all the information you need to facilitate placement?
 - b. Prompt using the FLBP business process diagram, compare how it works to the FLBP placement business process diagram and note any differences.
20. Where do the FLBP graduates who want to work in this province come from?
21. Is your province able to place all of the FLBP graduates who want to work here?
 - a. If yes or no, what are the reasons for this?
 - b. If no, do you submit a list of unplaced graduates to the DBE?
22. Do you receive a list of unplaced graduates from the DBE?
 - a. If yes, how do you deal with it?
 - b. Are you able to place FLBP graduates who want to work in other provinces but are unplaced?
 - c. Do PEDs communicate amongst one another regarding unplaced graduates?
23. Within what period of time are graduates usually placed in teaching posts following graduation?
 - a. Is the placement period for graduates (60 days) a realistic time for placement to happen?
24. What happens to FLBP graduates who are not placed within 60 days?
25. Have you had FLBP graduates who have rejected a placement?
 - a. If yes, what course of action is taken and by whom?
26. How do you deal with graduates who are uncontactable (i.e. do not answer the phone and do not avail themselves for placement?) - what measures do you take?

²⁰ Issuing of promissory letters by PEDs is described as part of the Awarding and Disbursement business process but should be asked about here.

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27. Are graduates tracked into a teaching post and beyond? How does this work?
 - a. Does monitoring take place to ensure compliance with contractual obligations (i.e. one year of service per year of bursary) and if so how?
 28. What are the consequences for students who do not complete their required service period?
 29. We understand that some graduates are placed in temporary posts, do you follow up to assist them to become permanent?
 30. How do you manage the placement of FLBP graduates in relation to the placement of other teachers and graduates?
 - a. Excess teachers
 - b. Temporary teachers
 - c. Other graduates
 - d. Do FLBP graduates take priority?
 31. What is working well in terms of placement?
 32. What are the problem areas in terms of placement?
 33. How can the placement process be improved?

Management, administration, coordination and monitoring

34. Is the FLBP adequately managed and coordinated overall and by specific stakeholders? Why do you say that?
 - a. Overall
 - b. DBE
 - c. HEIs
 - d. Districts
 - e. Other
35. Is there sufficient human capacity in place to implement the FLBP key business processes (recruitment, selection, awarding and disbursement and placement)?
 - a. DBE
 - b. HEIs
 - c. Districts
 - d. Other
36. Are there adequate/sufficient systems in place to support the FLBP business processes?
37. What monitoring data are you asked to collect/provide in relation to the FLBP?
 - a. What data is collected/provided?
 - b. Who collects the data?
 - c. When is data collected/provided?
 - d. To whom is the data provided?
38. What monitoring data do you need to fulfil your role and responsibilities in the programme?
 - a. Are you able to access this data?
 - b. What is the data quality like?
 - c. How is this monitoring data used?
39. What is working well in relation to:
 - a. Management

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- b. Administration
 - c. Coordination
 - d. Monitoring
40. What are the problem areas in relation to:
- e. Management
 - f. Administration
 - g. Coordination
 - h. Monitoring
41. How could/should the FLBP management, administration, coordination and monitoring systems be strengthened?

Addressing real needs

42. What trends have you noticed in terms of the subject and phase specialisations of FLBP graduates?
43. Is the FLBP helping to address teacher supply needs in your province?
44. Do you have opportunity to give input into the identification of FLBP priority areas?
- a. If so how?
45. How – if at all – does the FLBP take province-specific context and needs into account?
46. Are the subject and phase specialisations of the FLBP graduates aligned with the needs of your province?
47. Are FLBP graduates assigned to geographic areas of need?
48. Do you have any suggestions as to how the FLBP could better address the teacher supply needs in your province?

DBE MIS/SITA Interview schedule

This instrument is designed to be used with SITA, DBE and DHET officials involved in the management, coordination and administration of the FLBP data. Relevant officials can be interviewed jointly if there is more than one person responsible for this function.

INTRODUCTION

JET has been appointed to evaluate the implementation of the FLBP for the period 2007 – 2012. This interview forms part of a set of key stakeholder interviews. The purpose of the interview is to explore your thoughts experiences in relation to the FLBP, specifically, the achievements and constraints of the programme design and implementation and what you see as successes and lessons learnt. I will be asking you structured questions in this interview to guide our conversation.

CONFIDENTIALITY

Information you provide in this questionnaire is strictly confidential. No names will be used in reporting research findings. Quotes will be anonymous and general themes will be reported on. The interview is a safe environment for you to share your perceptions and experience. Thank you for taking the time to be interviewed.

Interviewer:		Date of interview:	
Start time of interview:		End time of interview:	
Name of person(s) being interviewed		Designation (current occupational role)	
Role on the FLBP		Length of involvement in the FLBP programme (yr)	
Interviewee contact details			

Reflect briefly below on the interview, your notes will assist the data analysis team to interpret contextual and other factors which may influence the data

Notes on the interview

Were any difficulties encountered in arranging the interview?
 Were you able to build rapport with the respondent(s)? Why or why not?
 Was the interview disturbed or interrupted?
 If more than one person was interviewed together, did they seem comfortable with this arrangement or not?
 Were there any questions which the respondent(s) did not answer or was reluctant to answer? If so which were these?
 Do you feel that the respondent(s) were open and honest and answered the questions to the best of their ability?
 Was the respondent(s) in a hurry to complete the interview?
 Were you able to cover all relevant questions?
 Do you feel that anything important was left unsaid?

Role in relation to the programme

1. What is the overall mandate of SITA? *[this question is for the SITA officials only]*
2. How does support for the FLBP programme fit into that mandate? *[this question is for the SITA officials only]*
3. What is your understanding of the purpose of the FLBP data which you process?
4. What is your role and what are your responsibilities in relation to the FLBP?
5. What activities do you undertake to do that?

Monitoring and data management processes

6. Please describe the data management processes followed in relation to the FLBP data? What is the process from beginning to end?
 - a. What data is collected and captured at each stage of the programme in terms of the key business processes?
 - i. Recruitment and application process
 - ii. Selection process
 - iii. Awarding and disbursement process
 - iv. Placement process
 - b. By whom is it collected and captured?
 - c. When is this data collected and captured (provide a sequence of events)?
 - d. How is data processed? What are the products? (reports, graphs, tables, presentations etc.)
 - e. What is the processed data used for?
 - f. Who has access to this data? (find out about issues of confidentiality)
 - g. What quality assurance mechanisms are in place to monitor data collection, capture and processing?
7. What is working well and what are the problem areas in terms of monitoring and data management? *(Probe in relation to issues raised in your notes Jennifer)*
8. What is the data quality like at each stage? *(Probe in relation to issues raised in your notes Jennifer)*

Stakeholder relations

9. Who are the main stakeholders that you interact with in relation to FLBP data and monitoring?
 - a. DBE
 - b. DHET
 - c. PEDs
 - d. Districts
 - e. HEIs
 - f. NSFAS
 - g. Other
10. What data is provided to you by the following stakeholders? (only in relation to those identified in Q8)
 - g. DBE
 - h. DHET

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- i. PEDs
 - j. Districts
 - k. HEIs
 - l. NSFAS
 - m. Other as outlined above
11. What data is provided by you to the following stakeholders? (only in relation to those identified in Q8)
- a. DBE
 - b. DHET
 - c. PEDs
 - d. Districts
 - e. HEIs
 - f. NSFAS
 - g. Other as outlined above
12. Would you describe your relationships with these stakeholders as strong/good or weak/poor?
- a. DBE
 - b. DHET
 - c. PEDs
 - d. Districts
 - e. HEIs
 - f. NSFAS
 - g. Other as outlined above

Management, administration, coordination and monitoring

13. Within SITA/the DBE, who is responsible for data management?
14. Who else is involved in data administration, coordination and monitoring activities and what role(s) do they play?
15. Is the FLBP data adequately managed?
16. Is there sufficient human capacity in place to implement the FLBP data management processes (as mentioned above)?
17. Are there adequate systems in place to support the FLBP data processes? Are they adequate to deal with the nature of the data which is received?
18. Can you recommend any improvements to the FLBP data collection and management processes?
19. What monitoring data do you need to fulfil your role and responsibilities in the programme?
- g. Are you able to access this data?
20. How could/should the FLBP data and monitoring systems be strengthened?

Data relating to need for the programme

21. Is the FLBP data adequate enough to provide information about whether and how the bursary is addressing teacher supply needs in South Africa?
22. What data is available relating to national priorities – in terms of subject and phase?

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- c. What is the quality of this data like
 - d. Who is involved in collecting and processing this data?
 - e. How often are the priority areas data updated?
23. Can FLBP data map/match students to areas of need?
Do you have any suggestions as to how the identification of needs and mapping graduates to areas of need could be improved?

Sustainability and general questions

24. To what extent is the FLBP data able to produce information about programme efficiency (whether it is achieving value for money)?
25. To what extent is the FLBP data able to produce information about programme effectiveness (whether it is on track to achieve its goal and objectives)?
26. Do you feel the way in which FLBP monitoring and data management takes place is sustainable?
a. If yes or no, why do you say this?
27. How could the FLBP monitoring and data management be improved/strengthened?

National Treasury Interview schedule

This instrument is designed to be used with National Treasury officials involved in the Funza Lushaka Bursary Programme (FLBP). Relevant officials can be interviewed together or separately and their details captured below.

INTRODUCTION

JET has been appointed to evaluate the implementation of the FLBP for the period 2007 – 2012. This interview forms part of a set of key stakeholder interviews. The purpose of the interview is to explore your thoughts and experiences in relation to the FLBP, specifically, the achievements and constraints of the programme design and implementation and what you see as successes and lessons learnt. I will be asking you structured questions in this interview to guide our conversation.

CONFIDENTIALITY

Information you provide in this questionnaire is strictly confidential. No names will be used in reporting research findings. Quotes will be anonymous and general themes will be reported on. The interview is a safe environment for you to share your perceptions and experience. Thank you for taking the time to be interviewed.

Interviewer:		Date of interview:	
Start time of interview:		End time of interview:	
Name of person(s) being interviewed		Designation (current occupational role)	
Role on the FLBP		Length of involvement in the FLBP programme (yr)	
Interviewee contact details			

Reflect briefly below on the interview, your notes will assist the data analysis team to interpret contextual and other factors which may influence the data

Notes on the interview

Were any difficulties encountered in arranging the interview?

Were you able to build rapport with the respondent(s)? Why or why not?

Was the interview disturbed or interrupted?

If more than one person was interviewed together, did they seem comfortable with this arrangement or not?

Were there any questions which the respondent(s) did not answer or was reluctant to answer? If so which were these?

Do you feel that the respondent(s) were open and honest and answered the questions to the best of their ability?

Was the respondent(s) in a hurry to complete the interview?

Were you able to cover all relevant questions?

Do you feel that anything important was left unsaid?

Role and responsibilities in relation to the programme

1. Please explain the role that the Treasury plays in the management, administration and coordination of the FLBP?
2. In your perception, is the role that the Treasury plays clear and well-articulated?
 - Discuss what their role is and whether they themselves understand what this role is.
3. What challenges has the Treasury faced in fulfilling its role in relation to the FLBP?

Stakeholder Relations

4. Who are the main Stakeholders that the Treasury interacts with in relation to the FLBP and how often do you interact with them?
 - a. DBE
 - b. NSFAS
 - c. Other
5. How would you describe your relationship with the stakeholders with whom you interact with (is it strong/good or weak/poor and why is this)?
 - a. DBE
 - b. NSFAS
 - c. Other (as outlined above)
6. In your opinion, do all the stakeholders involved in the programme fulfil their roles and responsibilities as expected?
 - Discuss the roles of NSFAS, the DBE, PED's, HEIs and students.
 - Explore the challenges that they feel have been faced by the other stakeholders and the improvements that they recommend to be made.

Management, administration, coordination and monitoring

1. Please discuss the Treasury requirement that the FLBP is administered by NSFAS.
 - Explore why this decision was made and what the benefits and challenges are.
2. What challenges have been faced in the coordination between the Treasury and the other stakeholders in relation to the FLBP?
 - a. Discuss challenges that have been experienced in the delayed processing and disbursement of funds.
 - b. Discuss challenges relating to the differences in the planning cycles of the Treasury, government and HEIs.
3. Treasury allocates funding to the FLBP after each new financial year in April. Please elaborate on this process in relation to the way in which FLB funds are allocated.
4. What support is provided – if any - by the Treasury to the different stakeholders to ensure the efficient use of the FLB funds that are allocated?
5. How does the Treasury monitor the use of the funds that it disburses towards the FLBP?
 - Discuss measures in place to ensure the sufficient utilisation of funds.
 - How does the Treasury ensure that there is efficiency in the utilisation of these funds?
 - Information should be provided in reports received from DBE regarding progress relating to the FLBP. When are these submitted and how are the targets monitored?

-
- How could this process can be improved upon?
6. Please explain the strategies in place that are used in the retrieval of bursary funds after students graduate (NB may not be able to answer this question as it is primarily the responsibility of NSFAS).
 - Explore the SMS system used to contact bursars.
 - Discuss the processes in place to address defaulting bursars.
 - Discuss how funds are reversed from bursars that do not take up the bursary after it has been allocated to them.
 7. Does the Treasury have an interest in bursars who do not fulfil their service obligation and owe funds to the state?
 - Discuss whether any reports on this are provided.
 - Discuss also whether reports on the processes involved in loan conversion are provided to the Treasury.
 8. Does the NT disburse funds to any other government department other than DHET for any other bursary schemes? If yes, please identify the departments and the basis of this provision?
 9. Please discuss whether the bursary schemes referred to above have similar processes to the FLBP and whether there can be any lessons learned from the other bursary schemes?

Funding

10. Is the funding sufficient to the running of the FLBP?
 - How and when the amounts to be allocated decided?
11. What are the intentions if any to increase the funding allocation for the FLBP?
 - Discuss this given the aim of the FLBP to increase first time enrolments to study teacher education by 10% each year.
12. Has there been any motivation from the DBE to increase the funds allocated to the FLBP?
 - If yes, explore the extent to which this is linked to the performance monitoring and evaluation targets of the DBE.
13. What would be the challenges of such an increase in the funds available to the FLBP?

Sustainability and general questions

14. Do you feel the FLBP is a sustainable programme?
15. If yes or no, why do you say this?
 - Probe about funding, business processes, human resources and partnerships.
16. How could the FLBP be improved or strengthened?
17. Do you feel the FLBP is efficient – is the programme achieving value for money?
18. If yes or no, why do you say this?
19. Do you feel the FLBP is effective – is the programme on track to achieve its goal and objectives?
 - If yes or no, why do you say this?

University officials involved in financial/bursary administration

This instrument is designed to be used with university officials from financial aid offices involved in the administration of the FLBP. Relevant officials can be interviewed together or separately and their details captured below.

INTRODUCTION

JET has been appointed to evaluate the implementation of the FLBP for the period 2007 – 2012. This interview forms part of a set of key stakeholder interviews. The purpose of the interview is to explore your thoughts and experiences in relation to the FLBP, specifically, the achievements and constraints of the programme design and implementation and what you see as successes and lessons learnt. I will be asking you structured questions in this interview to guide our conversation.

CONFIDENTIALITY

Information you provide in this questionnaire is strictly confidential. No names will be used in reporting research findings. Quotes will be anonymous and general themes will be reported on. The interview is a safe environment for you to share your perceptions and experience. Thank you for taking the time to be interviewed.

Interviewer:		Date of interview:	
Start time of interview:		End time of interview:	
Name of person(s) being interviewed		Designation (current occupational role)	
Role on the FLBP		Length of involvement in the FLBP programme (yr)	
Interviewee contact details			

Reflect briefly below on the interview, your notes will assist the data analysis team to interpret contextual and other factors which may influence the data

Notes on the interview

Were any difficulties encountered in arranging the interview?

Were you able to build rapport with the respondent(s)? Why or why not?

Was the interview disturbed or interrupted?

If more than one person was interviewed together, did they seem comfortable with this arrangement or not?

Were there any questions which the respondent(s) did not answer or was reluctant to answer? If so which were these?

Do you feel that the respondent(s) were open and honest and answered the questions to the best of their ability?

Was the respondent(s) in a hurry to complete the interview?

Were you able to cover all relevant questions?

Do you feel that anything important was left unsaid?

If you have limited time for the interview allocate your time in the following way: Responsibilities 2%, stakeholder relations 6%, recruitment 10%, selection 20%, awarding and disbursement 20%, placement 20%, management, administration, coordination and monitoring 10% , addressing real needs 6%, sustainability and general questions 6%.

Role in relation to the programme

1. Describe your responsibilities in the Funza Lushaka bursary programme?
 - Discuss what key activities are undertaken to fulfill their responsibilities
 - Do they feel their role and responsibilities are clearly articulated?
 - Discuss what challenges they have experienced in fulfilling their role.
 - Explore what further support they feel they require to fulfill their role.

Stakeholder relations

2. Who are the main stakeholders you interact with in relation to the FLBP?
 - a. DBE
 - b. HEIs
 - c. Districts
 - d. Other
 - Explore how they feel the relationships with the Stakeholders they interact with can be strengthened and improved.
 - Discuss the communication processes between the different role players that they interact with and the effectiveness of this communication.
3. In your opinion, do all the stakeholders involved in the programme work well together and fulfill their roles and responsibilities as expected?
 - Probe whether the different units at the HEI like FAO, Fees office, accommodation etc work well together.
 - Discuss what challenges they may face in relation to the other stakeholders.

Awarding and disbursement process

4. How does the awarding and disbursement process work?
 - Prompt using the FLBP business process diagram, compare how it works to the FLBP awarding and selection business process diagram and note any differences.
 - Probe regarding how students are notified that they have received a bursary.
 - Probe how they work with a DBE approved bursary award list to claim from NSFAS including the document which are required to be submitted to NSFAS.
 - Probe how the declining of the bursary by some students is addressed and how replacements are managed.
 - Probe regarding how funds are allocated to a student once funds are released by NSFAS? (What happens and how many tranches is the bursary paid in?)
5. In the event that there are delays in the disbursement of funds, does the HEI support students and if so how?
6. What is working well in terms of the awarding and disbursement process?
7. What are the problem areas in terms of the awarding and disbursement process?

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- Probe in relation to NSFAS and the financial aid office at the HEI.
 - Probe in relation to disbursement.
 - Are there delays in the payment of bursaries to learners of the FLBP? What have been the reasons for such delays?
 - Probe in relation to whether the HEI provides support to learners in the event of delays
8. How can the awarding and disbursement process be improved?

Placement process

9. What role do you play – if any – in collating and providing student placement information to the DBE?
- Do you encounter any challenges in this regard (e.g. students not submitting complete information, students' not submitting information on time).

Management, administration, coordination and monitoring

10. Is there sufficient human capacity in place fulfil your role in the delivery of the FLBP?
11. Are there sufficient systems in place to support your role in the delivery of the FLBP?
12. What monitoring data are you asked to collect/provide in relation to the FLBP?
- a. What data is collected/provided? (For example students signed contracts or information on desired placement)
 - b. Who collects the data?
 - c. When is data collected/provided?
 - d. To whom is the data provided?
13. What monitoring data do you need to fulfil your role and responsibilities in the programme?
- a. Are you able to access this data?
 - b. What is the data quality like?
 - c. How is this monitoring data used?
14. What have been the challenges if any that you have experienced in collecting the monitoring data that you require?
15. How could/should the FLBP monitoring systems be strengthened?

Sustainability and general questions

16. How are the tuition fees calculated?
- We understand there has been a spike in tuition costs at some institutions (i.e. CPUT and UniVEN) where the main teacher education intake is FLBP bursars, are you able to comment on this?
17. Do you feel that the funds provided by Funza are sufficient to provide students with a full-cost bursary (i.e. which covers registration and tuition fees, books, stationary, accommodation, transport and food)?
18. What other bursary programmes are available to education students at your institution?
- Discuss how they advertise these other bursaries and what information they have available to students.

19. Do you feel that the FLBP is a sustainable programme?

- Probe about funding, business processes, human resources and partnerships.

20. What suggestions would you make for the improvement of the FLBP?

Deans and Academic Coordinators at universities Interview schedule

This instrument is designed to be used with university deans and academic coordinators involved in the administration of the FLBP. Relevant officials can be interviewed together or separately and their details captured below.

INTRODUCTION

JET has been appointed to evaluate the implementation of the FLBP for the period 2007 – 2012. This interview forms part of a set of key stakeholder interviews. The purpose of the interview is to explore your thoughts and experiences in relation to the FLBP, specifically, the achievements and constraints of the programme design and implementation and what you see as successes and lessons learnt. I will be asking you structured questions in this interview to guide our conversation.

CONFIDENTIALITY

Information you provide in this questionnaire is strictly confidential. No names will be used in reporting research findings. Quotes will be anonymous and general themes will be reported on. The interview is a safe environment for you to share your perceptions and experience. Thank you for taking the time to be interviewed.

Interviewer:		Date of interview:	
Start time of interview:		End time of interview:	
Name of person(s) being interviewed		Designation (current occupational role)	
Role on the FLBP		Length of involvement in the FLBP programme (yr)	
Interviewee contact details			

Reflect briefly below on the interview, your notes will assist the data analysis team to interpret contextual and other factors which may influence the data

Notes on the interview

Were any difficulties encountered in arranging the interview?
 Were you able to build rapport with the respondent(s)? Why or why not?
 Was the interview disturbed or interrupted?
 If more than one person was interviewed together, did they seem comfortable with this arrangement or not?
 Were there any questions which the respondent(s) did not answer or was reluctant to answer? If so which were these?
 Do you feel that the respondent(s) were open and honest and answered the questions to the best of their ability?
 Was the respondent(s) in a hurry to complete the interview?
 Were you able to cover all relevant questions?
 Do you feel that anything important was left unsaid?

If you have limited time for the interview allocate your time in the following way: Role in relation to the project 2%, stakeholder relations 10%, recruitment and selection 40%, disbursement 20% placement 10%, management, administration, coordination and monitoring 10% , sustainability and general questions 8%.

Role in relation to the programme

1. Describe your role and responsibilities in the Funza Lushaka bursary programme (FLBP)?
 - Discuss the extent to which they feel their role is clearly articulated.
 - Discuss the challenges experienced if any.
 - Discuss what further support they feel they require if any.

Stakeholder relations

2. Who are the main stakeholders you interact with in relation to the FLBP?
 - a. DBE
 - b. HEIs
 - c. Districts
 - d. Other
 - Discuss whether they feel these relationships are strong/good or weak or poor.
 - Discuss how they feel these relationships can be improved.
3. To what extent do you feel that the different agencies that interact to deliver the FLBP work well together?
 - Probe on the working relationship between the NSFAS, DBE and PED's.
 - Probe whether the different units at the HEI like FAO, Fees office, accommodation etc work well together.
 - Discuss whether they feel all the agencies in the programme fulfill their roles and responsibilities as expected.

Recruitment and Selection Process

4. Please describe the application procedures that potential students follow when attempting to join your institution and when applying for the FL bursary?
 - Discuss in relation to the district recruitment process and the online application process.
 - Elaborate on whether and if so how they market the FLBP to attract students.
5. What is working well in relation to the recruitment and application process at the HEI?
6. What is not working well in relation to the recruitment and application process at the HEI?
 - Probe instances where students apply for the bursary but not to the institution.
 - Probe whether students face challenges in paying the application fees.
7. How could the recruitment and application process be improved?
8. What is involved in the selection process of FLBP bursary recipients into your institution?

-
- Discuss the selection criteria used to select FLB recipients.
 - Discuss the HEI selection committee and who is involved, as well as their level of participation.
 - Discuss participation in district-based selection (organized by the PED).
 - Discuss the preparation of students' academic results for election (for both new applicants and reaward cases)
 - How long does the process take?
9. What is working well in terms of the selection process?
10. What is not working well in terms of the selection process?
11. How could the selection process be improved?
12. Who do you understand to be the intended recipients of the FLBP?
- Discuss whether the programme is reaching the target recipients.
13. Has the FLBP been successful in attracting more students into teacher education and specifically into identified priority subjects and phases?
14. What have been the enrolment trends since the FLBP was introduced?
- Elaborate on which subjects and phases FLBP bursars are specializing in.
 - Discuss whether the programme is attracting students who are willing to fill posts in rural areas.
 - Discuss whether there are subjects and phases that are being neglected because of the FLBP (e.g. in the WC fewer students are studying Afrikaans because this is not a priority subject but Afrikaans teachers are needed in the WC).
15. What other bursaries are available to teacher education students at your institution?
16. How do you view the FLBP recipients compared to students that receive other bursaries or who do not receive bursaries at all?
- Probe in relation to their motivation to become teachers.
 - Discuss their academic performance in comparison to other education students (where a comparison can be made).

Awarding and disbursement process

17. How does the awarding and disbursement process work at your HEI?
- Prompt using the FLBP business process diagram, compare how it works to the FLBP awarding and disbursement business process diagram and note any differences.
18. What has worked well for the university in terms of the awarding and disbursement of the FLBP?
19. – What challenges has the university experienced in relation to the awarding and disbursement of the FLBP?
- Discuss challenges they may have experienced in the disbursement of funds from NSFAS.

-
- Discuss challenges the university may have faced as a result for example delays in the disbursement of funds (for example, students registering late or dropping out altogether)
 - Discuss the challenges students may face as a result of delays in payment.
 - Discuss support provided by the university to students in the event of long delays in the disbursement of bursary funds.

20. How could the awarding and disbursement process be improved?

Placement Process

21. What is required of FL students in the year in which they will graduate?

- Elaborate on the actions required of students during their final year of study.
- Discuss the HEI's obligations to provide the DBE with information and what challenges if any they have had.
- How is the DBE informed when students who received the FL bursary for one or more years - but not in their final year are going to graduate?

22. What role do you play in ensuring that there is adequate communication between the DBE, Provincial Education Department and FLB students during their final year at your institution?

23. What do you feel could be improved with regards to the placement of students into schools after they graduate from your institution?

Management, administration, coordination and monitoring

24. What processes are in place to monitor Funza Lushaka students during their study period at your institution (Funza and non Funza students)?

- If they monitor students, what does this involve?
- Discuss monitoring students academic performance.
- Discuss monitoring when students change the subject areas that they applied for when they received the bursary.
- Discuss how the monitoring data is used.
-

25. How do you think that the process to monitor Funza bursars can be improved?

- Discuss this in relation to monitoring their academic performance.
- Monitoring their choice of subject areas.
- Discuss what support they would need to make such improvements.

26. What kind of support does the HEI provide to underperforming students?

27. Apart from academic support (described above), what other form of assistance do FLBP students receive if any?

- Do they feel the support FLB receive is enough (academic and non-academic)?
- Discuss what other forms of support they feel FLB require (how this can be improved)?

Sustainability and general questions

-
28. Do you feel that the FLBP takes province-specific context and needs into account?
29. Do you have any suggestions as to how the FLBP could better address the teacher supply needs in your province?
30. With the view to sustainability, how can the FLB programme be strengthened?
- Discuss in relation to programme management.
 - Discuss in relation to meeting teacher supply needs.

Annexure G: Completed FLBP interviews and focus groups

Table 1: Schedule of completed FLBP interviews and focus groups

Name of Participants	Job titles	Institution	Mode of interview	Date of interview
Gerrit Coetzee	Director: ITE	DBE	face to face	
Professor Graham Hall	Former consultant: FLBP	Wits	face to face	
Dr Trevor Coombe	Former consultant: DBE/DHET	Cape Town	telephonic	
Dr Whitty Green	Chief Director: teacher education	DHET	face to face	
Palesa Tyobeka	DDG: Districts	DBE	face to face	
Firoz Patel	DDG: Planning	DHET	face to face	
Mphumzi Rululu	Financial aid officer	CPUT	face to face	23/10/2014
Dr Ivan November and Fadeelah Karriem	Assistant Dean and Funza academic coordinator and secretary to assistant dean	CPUT	face to face	23/10/2014
Student focus group	6 final year students	CPUT	face to face	28/10/2014
Mr T Williams and Mr M Klaasen	Faculty of humanities administrator and bursary and loans division bursary officer	CUT	face to face	22/10/2014
Martin Gustafson	Researcher and advisor in the office of the DG	DBE	face to face	6/10/2014
Ms Florence Modipa	Deputy Director: curriculum implementation and quality improvement	DBE	face to face	6/10/2014
Diane Parker	Acting DDG: Universities	DHET	face to face	21/10/2014
Edna Matsepo Mokoena		DUT	face to face	13/10/2014
Spencer Janari	Chief Director: Education and related departments	National Treasury	face to face	23/10/2014
Ms C Mally and Ms B Du Plessis	Financial administration officer: bursaries and faculty of education academic coordinator	NIHE	face to face	23/10/2014
Student focus group	3 student recipients (2007-2012)	NIHE	face to face	23/10/2014
Professor Aletta Delpont and Ms Muriel Geswint	Academic coordinator and bursary administrator	NMMU	face to face	23/10/2014
Student focus group	7 students	NMMU	face to face	24/10/2014
Mr Enrico Pienaar and Mr Msulwa Daca	NSFAS bursary manager and CEO	NSFAS	face to face	22/10/2014
Student focus group	5 students	NWU (MF)	face to face	20/10/2014

Name of Participants	Job titles	Institution	Mode of interview	Date of interview
Professor Dawid Gericke, Ms Inonge Kalula,	Head school of Education, academic coordinator,	NWU (MF)	face to face	20/10/2014
Ms Bogadi sito and Mr Kurt Swartz	administration officer and financial administrator	NWU (MF)	face to face	20/10/2014
Mrs Triens Jacobs and Mr Danie Hefer	bursary administration	NWU (PT)	face to face	23/10/2014
Mr Terrence Naidoo and Mr Small Nkosi	Placement and recruitment coordinators	PD KZN	face to face	16/10/2014
Mr Gerhard Botha and Mr Chibo	Coordinator district based recruitment	PED EC	face to face	21/10/2014
Mr D Molosioa	Senior human resource officer: human resources/strategic development- bursaries	PED FS	face to face	20/10/2014
Mr Khodumo	Acting DD HR: recruitment	PED FS	face to face	20/10/2014
Mr J Ndala	Assistant Director: Recruitment and selection	PED GP	Telephonic	11/09/2014
Ms Z Rabothata	DCES: teacher development	PED GP	Face to face	17/09/2014
Ms E Ndlebe	Director: recruitment and selection	PED GP	Face to face	7/11/2014
Mr LM Langa	Placement coordinator	PED LP	telephonic	13/10/2014
Ms Suzan Malima	Director: teacher development	PED LP	face to face	3/10/2014
Mr Hennie de Beer	Placement coordinator	PED MP	telephonic	November
Mr Richard Thwala	former provincial coordinator	PED MP	face to face	1/10/2014
Ms R Tyler	Director	PED NC	telephonic	12/11/2014
Ms Marubini Lukhaimane, Mr Thabo Sechele and Mr Dan Ngwenya	Director: HRD, district-based coordinator and placement coordinator	PED NW	face to face	21/10/2014
Ms Cheryl le Roux and Mr Alfred Shasha	Coordinators district based recruitment	PED WC	face to face	12/09/2014
Mr Rudolf Oosthuizen and Mr Rudolf Joost	Coordinators placement	PED WC	face to face	25/09/2014
Dr Bev Moore	academic coordinator	RU	face to face	22/10/2014
Professor Moses Makgatho	Academic coordinator	TUT	face to face	8/10/2014
Sipho Nkwana	Financial administrator	TUT	face to face	8/10/2014
Professor Rob Sieborger	Academic coordinator	UCT	face to face	14/10/2014

Name of Participants	Job titles	Institution	Mode of interview	Date of interview
Ms Belinda Harry	administration officer (Elondon and Alice)	UFH	face to face	20/10/2014
Prof George Moyo, Mr A Kganedi and Ms N Bambiso	Acting Dean, Head of School of further and continuing education and school of general and continuing education	UFH	face to face	20/10/2014
Student focus group	6 final year students	UFH Alice campus	face to face	21/10/2014
Ms A Majiedt	Faculty of Education bursary administrator	UFS	face to face	21/10/2014
Prof D Francis and Dr Moreeng	Dean of Education and academic coordinator	UFS	face to face	21/10/2014
Student focus group	6 students	UJ	face to face	20/10/2014
Dr Thabile Ntombela and Samukelisiwe Mngomezulu	Administration officer and academic coordinator	UKZN	face to face	13/10/2014
Student focus group	5 students	UKZN	face to face	14/10/2014
Mr Michael Davids	financial aid manager	UKZN	face to face	13/10/2014
Dr Satsope Maoto, Ms Dolly Ramaphoko and Dr SK Singh	HOD, administration officer and academic coordinator	UL	face to face	2/10/2014
Johannes Mashiyana	financial administrator	UL	face to face	2/10/2014
Student focus group	6 students	UL	face to face	2/10/2014
Naome Olamijulo	Designation?	UNISA	face to face	
Steven Shabangu	College of Education	UNISA	face to face	
Dr MP Mulaudzi and Mrs TJ Phadziri	Dean (previously academic coordinator) and administration officer	UNIVEN	face to face	3/10/2014
Ms M Nkuna	Financial administrator	UNIVEN	face to face	3/10/2014
Prof Sibiya, Ms Deirdre Smook and Nokuthula Mbokazi	Dean and academic coordinator and administrator	UNIZULU	face to face	15/10/2014
Student focus group	9 students	UNIZULU	face to face	15/10/2014
Ms E Schilling and Dr LD Beukes	Administration officer and academic coordinator	UP	face to face	17/10/2014
Ms V Moses	Financial administrator	UP	face to face	17/10/2014
Prof Arend Carl	Academic coordaintor	US	face to face	9/09/2014
Mr Chris Liebenberg	Administration officer	US	face to face	9/09/2014

Name of Participants	Job titles	Institution	Mode of interview	Date of interview
Professor Zubeida Desai, Dr Rajendran Govender, Dr Nadeen Moolla, Mr Ryan Adonis and mr Terence Plaatjies	Education Dean, Academic coordinator (B Ed), academic coordinator (PGCE), FLBP coordinator and recruitment and application coordinator	UWC	face to face	29/09/2014
Dr Jean Place, Ms Mfundo Mbatha, P	Academic coordinator, administration officer,	Wits	face to face	24/10/2014
Professor Sarita Rodman and Ms Minette Botha	head of administration and administration officer	UJ	face to face	24/10/2014
Dr C Mantlana and Ms Nombulelo Monoana	Acting Dean of Education Faculty and administrative officer	WSU	face to face	22/10/2014
Ms Aruba Nyati and Ms Namkla	FLBP administrative officer and financial officer	WsU	face to face	22/10/2014
Mr Haroon Mahomed	Director: CPTD	DBE	face to face	10/10/2014
Ms Leticia Munday	Director: HR	DBE	face to face	14/10/2014
Mr Mfela Mahlangu and Mr Mishumo Mamburu	Deputy Directors: HR	DBE	face to face	14/10/2014
Mr John Maluleke	Deputy Director: ITE	DBE	face to face	21/10/2014
Ms Lesedi Magano	Deputy Director: ITE	DBE	face to face	14/10/2014
Mr Majaha Hlatshwayo	Assistant Director: ITE	DBE	face to face	23/10/2014
Ms Lulekwa Tshambula	Chief Education Specialist: ITE	DBE	face to face	23/10/2014
Mr Anton Raubenheimer	Chief Director: GITO	DBE	face to face	16/10/2014
Mr Andre Taylor	Senior Manager	SITA	face to face	
Mr Kennedy Ratshitanga	Deputy Director: ITE	DBE	face to face	
	Academic coordinator	NIHE-MP	telephonic	November
SUBTOTALS:	9 student focus groups with 47 students			
	73 one on one and group interviews, with 112 participants			

Annexure H: Comparative analysis of relevant bursary programmes and key lessons learnt

1. Introduction

The purpose of this section is to provide a fairly broad review of two bursaries in South Africa and two bursaries on teacher education in the United Kingdom. The focus of the review includes the bursaries, goals and objectives; target groups; recruitment and selection, awarding, management and administration, monitoring. Finally, where information is available, the focus is to establish the effectiveness of the bursary programmes in achieving the set objectives. The review will extract and highlight key features in the conceptualisation, implementation, and impact of these bursaries that might be of relevance to the on-going improvement of the FLBP.

2. South African bursary schemes

The review of South African bursaries will focus on the Department of Agriculture, Forestry and Fisheries (DAFF), and the Department of Social Development (DSD) bursary programmes. These bursaries have been selected because they are nationally focused, and the DSD scholarship's focus on social development is important for the schooling sector as social workers provide services across the education sector. Further, the DSD scholarship, like Funza, has a service component, where students have to pay back the bursary through service, although they get a salary during their employment.

2.1 Goals and objectives

DSD scholarships are offered as part of a recruitment and retention strategy to address critical and scarce skills within social development. The Master List of Scarce and Critical Skills of 8 August 2006 (DoL, 2006, cited in HSRC, 2008), indicated that 21 020 social and community workers were required to fill positions within the labour market. Eight years later, in 2014, social workers are listed on DHET's Top 100 Occupations in Demand (DHET, 2014b). Social workers are in demand and they play a critical role in the implementation of state welfare programmes especially related to social problems related to unemployment in South Africa (HSRC, 2008). Specific examples of the scope and extent of the social problems social workers are required to attend to include; Firstly, the vulnerability of children as a result of HIV and AIDS. In 2006, government and social workers affiliated to NGOs were able to reach only 200 000 of the estimated 1.2 million AIDS orphans, and the rest had to fend for themselves (Pretoria News, 30 September 2006, cited in HSRC, 2008). Social workers are also needed for counselling and case management of those affected by HIV/AIDS (The Herald, 4 December 2006, cited in HSRC, 2008). Secondly, social workers have high caseloads of 63 – 300 each, which can result in negligence (Sowetan, 28 October 2005, cited in HSRC, 2008). Thirdly, social workers are needed to intervene in cases that involve substance use and abuse, those receiving social grants for foster care, older persons, people with disabilities, and people involved in criminal activity (DSD, 2012).

Given this context of the shortage of social workers, DSD developed the Recruitment and Retention Strategy (DSD, 2009), aimed at among other things, increasing the number of actively employed social workers through attracting and retaining social workers. The Social Services Practitioners Scholarship Policy is a key lever in the recruitment of students wanting to study and qualify with

social services qualifications (DSD, 2012). A key objective of the policy is to address the “shortage of social services practitioners through the training and development of selected potential candidates eligible to study towards a social work profession” (DSD, 2012: 6).

Based on the same principles of scarce skills and redress that inform the DSD, the Department of Agriculture, Forestry and Fisheries (DAFF) introduced the External Bursary Scheme in 2004 in response to government’s call to bridge the skills gap, promote rural development and to eliminate skewed participation in the agricultural sector in South Africa. The scheme is used as a vehicle to create a pool of researchers, scientists, skilled professionals and technicians in areas regarded as scarce and critical in agriculture, forestry and fisheries. The bursary scheme is implemented through an approved policy (DAFF, 2013)

2.2 Recruitment and selection

The DSD bursary is mainly focused on redress and is aimed at learners who are not employees of DSD; those who have completed social work degrees but are unable to graduate because they have outstanding debts to HEI, learners who come from disadvantaged communities, war veterans’ families and relatives, learners from rural areas with no access to electronic media and social media; learners residing in places of safety, learners from child headed households, and social services practitioners in the NGO sector. The bursary is also awarded based on a means test, to learners from socio-economic contexts where the combined household income is not more than R15 000/month.

The DSD scholarship application process is open from 1 September to 31 October each year for the following year’s selection, and it is advertised through the departmental and provincial websites, posters in provincial offices and universities, and visits to rural and peri-urban areas (DSD, 2012).

DSD does not acknowledge all applications but communicates only with shortlisted candidates. Selection is done at provincial level by a selection committee comprising the Head of Department (HOD) or Executive Manager/General Manager, Human Resources and the Chief Director Welfare Services and other competent persons delegated or selected by the HOD. Selections are considered final when approved by the DDG Social Services and Families. Provincial departments issue promissory notes to selected and approved students, and all successful students will sign a contract (DSD, 2012). The DSD scholarship guide emphasises the importance of passion in pursuing social work:

Social Work is not just a profession but a calling. Therefore students who REALLY want to pursue this noble profession must be very passionate about this profession and must be willing to assist the disadvantaged South African communities with all their problems regardless where they are, especially in rural communities. In an event that you might not be passionate about this profession, please look for other alternatives. Many government departments also provide bursaries that are in line with their mandate (DSD, 2014).

However, it is not clear how passion is determined in the selection process.

To improve placement in rural areas, DSD’s recruitment strategy is focused on students from deep rural areas where there are no social workers, so that as graduates they can work in their

communities which often experience extensive social challenges and are out of reach of public or private institutional service points to address these multiple challenges. Applicants are recruited by practicing social workers and a profile of each student with all supporting documents is kept in a file (Meeting between DSD and DBE, 31 July 2014).

The National Education Training Strategy for Agriculture and Rural Development in South Africa was developed by the Department of Agriculture in 2005, in consultation with various key stakeholders in the agricultural sector. This strategy highlights priority skills needs and constraints within the sector and categorises needs within five broad areas: agricultural production; agricultural engineering; agricultural economics; agricultural development; and veterinarians (Department of Agriculture 2005). Examples of degrees that have been funded in line with these categories, include:

- Bachelor of Veterinary Science (B.V.Sc.)
- B.Sc. Bioresource Engineering
- B.Sc. Viticulture and Oenology
- B.Sc. Food Science
- B.Sc. Agric. Entomology
- B.Sc. Agric. Plant Pathology
- B.Sc. Soil Science
- B.Sc. Agronomy
- B.Sc. Pasture Science
- B.Sc. Genetics
- B.Sc. Forestry and Wood Science
- B.Sc. Marine Biology
- B.Sc. Oceanography and Marine Biology
- B.Sc. Ichthyology, specialising in Aquaculture
- B.Sc. Zoology, specialising in Marine Biology/Ichthyology
- Nat. Dipl. Food Technology
- Nat. Dipl. Forestry
- Nat. Dipl. Oceanography
- Postgraduate (B.Tech Hons, Masters and Ph.D.) in relevant agriculture, forestry and fisheries study fields linked to the DAFF priority research projects (DAFF, 2013a).

Priority areas are also based on identified needs by the various directorates in DAFF. The DAFF bursary is advertised in June or July each year for the following year's intake, and advertising is through national mass circulation newspapers like the Sunday Times and Business Day, regional newspapers like Cape Argus, on notice boards at schools and tertiary institutions, municipalities and district offices. Advertisements are also on the DAFF website. Potential applicants can access application forms through tertiary institutions and when they have been submitted, they are captured and sorted according to fields of study advertised, to compile a preliminary list of shortlisted applicants. The shortlisted candidates are reviewed by the National Bursary Committee which makes the final selection based on the number of bursaries available for the year, determined by the available budget. During the selection of students for awarding, some students are included

on a waiting list so that they can be awarded a bursary if others on the first choice list decline to accept the bursary (DAFF, 2013b).

The selection criteria include academic performance based on the most recent academic reports, appropriate fields of study as determined by DAFF, financial need, gender and disability. Candidates are considered in line with DAFF’s employment equity plan and the demographics of the country. Bursary recipients must be South African citizens. A 14-point system, which takes into account race, gender, disability, academic performance and the economic and financial status of the candidate is also applied to the selection process. To mitigate high failure at university, achieving 10 points out of the 14 point system is used as a minimum score, or if a score below 10 points is achieved by a candidate an average of 60% academic performance in Maths and Physical Science is used taken into account to consider eligibility for funding. Applicants going to an FET should have a minimum or average score of 60% in Maths and Physical Science. Selection is also more favourable to those who have already started their studies and those who are at postgraduate level to enable them to complete their studies (DAFF, 2013b).

Since 2005, the bursary has received under 2000 applications each year, a low figure given the extensive advertising that is invested in. More than 30% of these applications each year are not relevant to the focus of the program because they are based on courses not being funded by DAFF, even in cases where the courses are clearly and explicitly specified in the adverts (DAFF, 2006; 2007; 2008; 2009; 2010; 2011; 2012; 2013a).

2.3 Awarding

For the DAFF bursary, award letters are forwarded to the successful candidates who are then asked to confirm their acceptance of the award and to provide letters of proof of acceptance by their respective tertiary institutions. Institutions where the students have been accepted are then notified of the bursary sponsorship. Students then receive contracts that set out the terms and conditions of the bursary, to sign (DAFF, 2013b).

2.4 Management and administration

The DSD bursary scheme has a coordination structure responsible for effective implementation of the programme. These stakeholders and their roles are described below:

Table 1: DSD Social work scholarship implementation stakeholders

Designation	Role
Director-General of DSD	<ul style="list-style-type: none"> Approves the annual budget
Deputy Director-General: Social Services and Families or any delegated official at Chief Director level	<ul style="list-style-type: none"> Approves the number of scholarships awarded on an annual basis.
Provincial head of Department	<ul style="list-style-type: none"> Recommend the successful candidates to the Department Sign the scholarship contracts on behalf of the Department. In his/her absence the HOD must delegate an official to sign the contracts on his/her behalf on an annual basis
Provincial coordinator	<ul style="list-style-type: none"> Ensure compliance with the Scholarship Framework Facilitate the short listing of applicants Keep records of the minutes Facilitate the selection of suitable candidates

Designation	Role
	<ul style="list-style-type: none"> • Keep files and records of the learners • Issue promissory notes to successful students to enable them to register
National programme manager	<ul style="list-style-type: none"> • Draft the operational plan and budget of the Programme. • Advertising of the Scholarship opportunities. • Coordinate and manage the final selection process. • Facilitate the settlement of the accounts of the students • Establishment of relations with relevant stakeholders • Conduct Orientation Programmes of new students at all universities • Provide support to all students at all universities • Promote the Scholarship Programme in deep rural or peri-urban areas. • Monitor performance and provide progressive information regarding performance and achievements of the objectives of the Programme. •
Higher Education institutions	<ul style="list-style-type: none"> • Inform the Department about the de-registrations of students. • Inform the Department if the student has changed the field of study. • Inform the Department about abscondments. • Submit the signed Schedule of Particulars to the Department to ensure effective settlement of students accounts. •

Source: DSD Social service practitioners' scholarship policy, 2012

The responsibilities of stakeholders for the DAFF bursary are highlighted below:

Table 2: DAFF external bursary scheme implementation stakeholders

Designation	Responsibilities
Minister of Agriculture, Forestry and Fisheries	Formulates the strategic vision, allocates budgets and quality reviews, and the ratifies the appointment of the National Bursary Committee.
National Bursary committee (comprising 12 members – representatives from provincial departments of agriculture, forestry and fisheries, the Land Bank, the Agricultural Research Council and the Director of DAFF Sector Education and Training	The committee is accountable to the Director-General and they meet twice a year and as and when necessary. The committee monitors the implementation of the External Bursary Scheme policy and procedures, approves the final list of bursary recipients, and awards bursaries to successful applicants using the 14-point system criteria as guide.
Director of DAFF Sector Education and Training	Chairs the bursary committee. The office of the Director acts as the secretariat of the committee, responsible for all matters relating to the committee, e.g. legal matters, writing of minutes, communication, arranging meetings and other administrative logistics, as well as coordinating the recruitment and selection process. The directorate is responsible for the overall management and administration of the bursary. The Directorate transfers the annual budget (funds) for the scheme to the National Student Financial Aid Scheme (NSFAS) for administration and the NSFAS provides the Department of Agriculture, Forestry and Fisheries with an audited financial statement each year.

Source: DAFF External bursary scheme policy and procedures, 2013b

It is important that both schemes involve the executive level and top senior management as this signals the significance of the programmes. Involvement of provincial level personnel is also significant as this is an integral level of service delivery. Particularly for the DSD scholarship, involvement of the province is important because placement of graduates is at the provincial level.

Data management of the DSD scholarship is manual. Details of students are captured on a locked spread sheet. Provinces recruit and capture information per university, and DSD verifies with universities if lists are captured correctly. NSFAS submits reports to DSD. If a student fails and cannot continue with the programme it is difficult to expect them to pay back given their poor background; though a clause to refund is included in the contract as required by National Treasury. In some cases a student is advised early to look for other funding from NSFAS or Eduloan. If a student manages to catch up, the bursary is reinstated. It is made clear to students that if they do not submit their end of year results or on completing their studies, it is breach of contract. Files are kept and updated by provinces that have an important role in the management of the scholarship including:

- Creating files for each scholarship recipient;
- Recording student results, which are submitted by 5 June, for funding not to be discontinued;
- Providing a report on re-awards; a student who fails is suspended and repayment demanded;
- Organising and facilitating orientation, which is an important component of the scholarship. Orientation for first year students takes place in March or April and involves engagement with the students to discuss the bursary agreement (done later in the year from August up to just before exams). Enough time is allocated for the orientation to clarify all issues to avoid having students who take up the bursary and not complete, as well as refuse to work in a rural area. Students also ask questions and raise concerns, for example, that they need supportive educational resources like laptops. All key stakeholders including the DSD, people from the Faculty of Social Sciences and the Financial Administrator are required to attend the orientation session, so that everything about the scholarship is made clear to students (Meeting between DSD and DBE, 31 July 2014).

2.5 Financial arrangements

Both the DAFF bursaries and DSD scholarships are administered by NSFAS. There is a Memorandum of Agreement between DSD and NSFAS. Both DAFF and DSD pay the bursary allocations from their budgets into the NSFAS. The NSFAS does not receive the funding for the scholarship and bursary directly from the National Treasury.

The DSD scholarship and DAFF bursary are explicit about what is funded and what is not (inclusions and exclusions) and so there are no gray areas about what academic related costs are. The full cost scholarship covers registration, study and examination fees; provides a field work/practical stipend; covers accommodation and meals at university residences and other places which have entered into formal agreements with universities, or else at other places that the student can find if there is no university accommodation. The bursary also covers special equipment for people with disability. The scholarship however does not cover computer hardware and software, membership affiliations, gym membership, private doctors' fees, bridging courses, and repeat courses or modules. The maximum

amount that can be paid annually to each student is determined by the national department. The scholarship will be paid for a maximum of seven years for UNISA students and a maximum of five years for full time students - three extra years for UNISA students and an extra year for full time students to complete their studies. Students are not allowed to change their field of study while on the scholarship and they are also not allowed to have another bursary (DSD, 2012). Universities provide DSD with the fee structure (Meeting between DSD and DBE, 31 July 2014).

The DAFF bursary covers registration, tuition, accommodation, prescribed textbooks, and makes provision for a stipend in the form of a monthly allowance for meals, travelling etc. for both undergraduate and postgraduate students. High school learners get funding for school fees, stationary, prescribed textbooks, school uniform once every two years, and boarding fees should this be required (DAFF, 2013b).

It appears as though, for the DAFF bursary, funds are apportioned according to two types of costs and paid out to students by the university in that way. The policy specifies that any cash accruals in the students' accounts from unutilised funds for tuition, books and accommodation shall be returned to the NSFAS. Any cash accrued in students' accounts as a result of unutilised funds for meals and allowances shall be refunded to students once a request for funds is approved by the department and payments shall be subject to set maximums. Refunds for discontinuing a course or for dropping out shall be returned directly to the NSFAS by the institution and the department shall be informed in writing of such refunds. The DAFF separation of expenses in this way seems useful, as it gives students the option to spend their allowance how they see fit. At the same time, the unused funds can be reinvested in the bursary scheme.

While the DAFF bursary covers accommodation, there are clear specifications with respect to what kind of accommodation outside the university will be paid for or cannot be paid for. All university accommodation is paid for but in order for private accommodation to be paid for, the student should present proof that he/she applied for accommodation within the institution on time and could not be accommodated in the institution's residences and hence, requires private accommodation. An accommodation allowance will then be paid, and the External Bursary department can perform a verification process, if deemed necessary. Private accommodation is prioritised for first-year new bursary holders who cannot be accommodated at institutions' residences because of late application for admission. The allowance for private accommodation is determined using the institutions' residences as a guideline. Students living in a private residence will complete forms providing details of the accommodation and landlord. If current bursary holders apply for university accommodation late and failed to be accommodated, or they prefer to stay in private accommodation while the university residence is available, only 50% of the cost of university accommodation will be paid to them. Students who stay at home with parents/spouses or guardians do not qualify for residence allowance but are entitled to a subsistence/travel allowance equal to 30% of the institution's residence fees.

Book allowances vary depending on the field of study, and institutions advise DAFF on the book allowance required by their students for a particular field of study and for a particular academic year. Meal allowances also vary based on advisement from institutions. Institutions provide an estimate of the amount required to cover meals for the year. The full amount or instalments thereof shall be paid to the institution. Meal allowances for students in private residences are paid over in

instalments and they are based on predetermined maximums, comparable to institutions of learning with full catering residences. Meal and residence costs are only paid during term time, and expenses in this regard incurred during holidays will only be considered under special circumstances and will need to be authorised by DAFF. Students staying at home with parents/spouses/guardians do not qualify for a meal allowance. The budget available for the bursary at the beginning of each academic year, as well as that which will be available at the beginning of the financial year will determine the amount of monthly allowance/stipend offered to bursary holders.

If a bursary recipient has a DAFF bursary, s/he is not allowed to accept any additional sponsorship/bursary that will impose an obligation on him/her to accept employment at the end of the study programme. This is a strange condition given that DAFF itself does not have an obligation to provide employment or internship opportunities to graduates. The bursary recipient can accept an additional sponsorship without contractual obligations, but they must inform DAFF of the value of the other sponsorship/bursary so that DAFF determines how the additional amount can contribute to the bursary recipient's expenses, depending on the level of study. Another restriction is that a bursar cannot have both provincial and national department of agriculture bursaries concurrently or switch sponsors between the provincial and national departments of agriculture because the funding for these bursaries are from the same source.

2.6 Monitoring and evaluation

The national and provincial departments are responsible for monitoring and evaluation against realistic and relevant performance measures, targets and timeframes (DSD, 2012). DAFF has quite extensive monitoring mechanisms including bursary monitoring meetings once every semester, counselling, analysing bursar's results, and visits to bursars' residences. Monitoring meetings involve convening bursars in each province, where matters on orientation, induction and bursary administration processes are discussed. Specialists in various careers being funded by the bursary are invited to motivate the students. Counselling of bursars is periodic, and is done telephonically and in person, to support bursars' academic progress. Those who fail the first semester will be visited on campus and counselled to determine reasons for failure to employ corrective action and inform bursars about possible cancellations of the bursary if academic performance does not improve. Funding for failing students becomes conditional upon improved results. Year end results are also analysed to make recommendations for continued funding. The bursary mostly encourages bursars to stay in university residences, and where this is not possible, students are visited at their private residences to determine suitability of the residence for academic success. If the residence is deemed unsuitable bursars are encouraged to find more suitable accommodation.

2.7 Placement

The DSD scholarship contract is signed by the student with the department at provincial level, and the contract binds the student to work for the provincial department for an equal number of years as the sponsorship. When students have completed their studies, the provincial departments should place them at the appropriate department or NGO. Should a student not be placed within three months of completion of their studies, they are released from their contractual obligation and they are free to look for their own employment. Students are also released from their contract when they have served the full contract period, or if they die or suffer permanent incapacity (DSD, 2012). According to DSD, the critical weakness in the bursary scheme was the placement of graduates by

the provinces. The example provided by DSD was of 112 graduates produced in the Free State but only 62 graduates placed in 2013. This is despite the fact that National Treasury allocates money to provinces annually to facilitate the employment of these social workers. MECs refused to sign an MOU which holds them accountable. In the past four years students recruited from urban areas like Soweto are not willing to work in rural areas (Meeting between DSD and DBE, 31 July 2014).

DAFF is not obliged to offer employment or experiential training such as internships after completion of studies. This is a major weakness with this bursary and defies the logic of the objectives of the bursary to provide skills to the agricultural sector and increase the number of scientists in the sector. Placement would be a major measure of the need for the bursary and if students are not placed, this would signal problems with the demand forecasting. However, even if the bursars are not placed, DAFF is still contributing critical skills to the sector.

2.8 Contract deviations

On the DSD scholarship, if a student decides to work elsewhere other than where the department has allocated them, or they terminate their contract early, the outstanding period of service will be calculated in monetary value to determine the debt the student should repay. This debt will be recovered from the student through legal processes within three years, upon agreement between the student and the department.²¹ If a private sector organisation is interested in offering employment to the student after graduation, the organisation will buy out the contract of the graduate from the department at the going rate at the time of the buyout (DSD, 2012).

3. International bursary schemes

Although there are several bursaries on initial teacher training, for example, the Australian Queensland Step into Teaching programme; Canada's Alberta's language bursaries;²² and the Remote Teacher Education Programme (RATEP) also in Australia (Lonsdale and Invargson 2003), the review selected only those schemes where information about the business processes could be discerned, as business process was a key theme to the review. This narrowed the review down to two schemes, the initial teacher training (ITT) training bursary, hereafter referred to as the ITT bursary; and the Further Education Initial Teacher Training (FE ITT) Bursary Initiative, both in the UK.

Goals and Objectives

The FE ITT was introduced in 2000 when there were recruitment difficulties and gaps in the provision of certain courses at further education (FE) level. The bursary was aimed at attracting high calibre people to train, qualify, and teach in the further education sector. This was in response to high vacancy rates and an ageing work force in the FE sector (York Consulting Ltd, 2004). Similarly, the ITT bursary is aimed at attracting and retaining high quality graduates into the teaching profession. The bursary is for graduates, as well as Advanced Level (A Level) students) who want to train for primary school teaching (National College for Teaching and Leadership, 2015).

²¹ Without access to the evaluation report of the DSD bursary, it was not possible to determine the success of debt recovery.

²²<http://education.alberta.ca/teachers/role/pd/bursariesfr.aspx>

Recruitment and application

In 2014/2015, the FE ITT bursaries were aimed at trainees taking a specialist teaching qualification in English, mathematics or special educational needs (SEN). However, trainees on generic programmes could also access the bursaries if the providers thought the combination of course content, teaching practice in the subject specialism and existing qualifications equipped them to teach English and mathematics from basic to the General Certificate of Secondary Education (GCSE), or to teach students with SEN. The providers' role in selecting suitable candidates is critical. Providers select students and also recommend any additional specialist training and teaching practice trainees might require. Applicants are funded for the professional qualification and not the basic degree. Candidates who want to teach maths should ideally have a mathematics degree; or a joint degree with mathematics; or a degree like physics or engineering, where the mathematics element is significant. However, other degrees are considered, subject to the ITT provider's judgement that the applicant has the necessary underpinning knowledge, skills and capacity to teach mathematics to students from basic to GCSE and level 3. Applicants who want to train to teach English language, should have an English language degree, or a humanities degree with a significant English language or linguistics component. Like for maths, other relevant degrees are considered. There is no specific subject requirement for those who want to specialise in SEN teaching - providers have the discretion to judge the applicant's suitability to teach students with SEN in FE. FE ITT bursary applicants should be studying towards the full-time, pre-service PGCE or Certificate of Education.

An evaluation that was conducted in 2003 by York Consulting Ltd to determine the impact of the bursary concluded that the bursary was a contributor to the substantial increase in the uptake of FE ITT, with applications increasing by 124% between 1998 and 2002. Between 1998 and 1999, FE ITT enrolment increased by 39 applications. In 2000, at the start of the bursary, there was an increase of 1130 applications, and in 2001, bursary applications increased by 1 208. The high number of applications meant that there was a larger pool to select from and this would promote the quality imperative, as the bursary would be awarded on a more competitive basis.

As a result of the bursary, several institutions which had not previously provided teacher training introduced full time teacher training, and they reported that they would not have been able to run the course without the bursaries as students would not apply. The evaluation also found that a majority (64%) of respondents would not have applied for teacher training without the financial assistance the bursary provided and just over one tenth (13%) of respondents highlighted that the bursary encouraged them to apply, as they would not have done so. In this regard, the bursary enabled 77% of applicants to gain access to FE ITT. Of these 77%, 68% went on to qualify and get a teaching post in FE. Another positive element of the recruitment strategy and the bursary was to enable women and younger people to access FE teaching opportunities. Over three quarters of the students on the bursary were female and the dominant age group awarded the bursary was in the 25–34 year age group.

The priority subjects for the ITT bursary are Biology, English, Geography, History, Music, classics, Design and technology, Physics, Chemistry, Mathematics and Computing. Specific requirements for eligibility include a degree in the subject, and higher degrees with experience. The ITT bursary scheme awards core and discretionary bursaries - core bursaries are mostly awarded to trainees who have the minimum lower second (2:2) pass requirement for their degree and also to other trainees

with relevant academic qualifications such as Masters, PhDs, overseas and medical degrees. Discretionary bursaries are awarded to applicants who have more experience and potential than their degree class would suggest (National College for Teaching and Leadership, 2015).

Selection and awarding

For both the FE ITT and ITT bursaries, the degree pass or classification is very important to determine the level of funding for specific priority areas. In this regard, the bursaries are merit bursaries in specified priority areas. The British classification for different levels of achievement for degrees is outlined below.

Table 3: British undergraduate degree pass classification

Class	Marks Level
First	70+
Upper Second	60–69
Lower Second	50–59
Third	45–49
Ordinary Pass	40–44

Source: Wikipedia

The York Consulting Ltd evaluation of the FE ITT found that methods of recruitment and selection varied across institutions as institutions operated independently and were tasked with recruiting the most appropriate and suitably qualified people onto courses. For reputational purposes, institutions are most likely to select the better candidates so that they achieve excellent retention and throughput rates. During the pilot in 2001 – 2003, selection was in three phases and included an interview, a written test and group observations. Students were interviewed by mentors in the college in which they would train, to assess their suitability for the training placement. In most institutions, heads of department used their extensive experience during interviewing of candidates to assess the suitability of applicants to teach adults in a college environment. Although there were no explicit rules about selection in the bursary, some criteria started emerging from the evaluators' engagement with college principals. Principals indicated that in their interviewing and assessment of students for selection, they looked for the following:

- students must have a 2.2 degree or above;
- a good academic past record;
- Maths and English at level 2;
- quality of experience counts over the level of degree;
- experience of working with young people;
- awareness of social, economic and political issues;
- students must be assertive;
- students must have the ability to solve problems;
- planning and organisational skills (York Consulting Ltd, 2004: 30)

Importantly, except for the requirements for the degree class, the Department for Education (DfE) did not provide an explicit definition of high calibre and left it at the discretion of institutions to decide how high calibre could be defined. However, because of the lack of clarity, institutions used

their discretion to award the bursary to all their enrolled students, indicating that they envisaged systemic problems if they taught some students who were funded and others who were not. Institutions who followed this logic distributed the bursary on a first come first served basis. They would follow the normal recruitment procedures and offer the successful recruits a bursary, and close recruitment when they had offered the number of places equivalent to the number of bursaries they receive from DfE.

The current academic requirements for the FE ITT are that applicants:

- Must have at least a 3rd class degree to access a bursary for mathematics,
 - At least a 2:1 degree for the English language or SEN bursaries.
 - With a 3rd class degree applicants must have at least a grade B at A level maths (Department for Business, Innovation and Skills, 2014).
- Selection for the ITT bursaries is based on the degree classification held by the trainee for the subject specialism in which they wish to train to teach. Also dependent on the specialisation the applicant wants to pursue, 'A' level results may be used to establish eligibility.
- Applicants must have at least a 2:2 to access a bursary in most shortage subjects, and at least a 2:1 for non-shortage subjects. It is not necessary for candidates to have secured a physics, chemistry, mathematics or computing PGCE place prior to selection (National College for Teaching and Leadership, 2015).

Financial Arrangements

The UK Departments for Business Innovation and Education provide the funding to institutions that manage the recruitment, application and selection, and award of the bursaries. All the admin work is done in the institutions. During the FE ITT pilot the bursary amount was £6 000 but this has been revised and differentiated according to priority area and the degree classification of the applicants as follows.

Table 4: Bursary allocations for FE ITT

FE ITT Specialisation	Degree Class			
	First	2.1	2.2	Third
Mathematics	£20 000	£20 000	£15 000	£9 000
English	£9 000	£4 000	No bursary	No bursary
SEN	£9 000	£4 000	No bursary	No bursary

Source: UK Department for Business Innovation and Skills, 2014, p. 8

As the table shows, maths specialisations receive a bursary for all degree classes, but the amount is differentiated according to the pass level. The other specialisations do not offer bursaries for 2.2 and third class passes.

The allocation of bursaries for ITT is similar to that of FE ITT, and is reflected in the table that follows. This allocation distinguishes merit by awarding different bursary amounts for different degree classifications, so it is clear how the merit criteria work.

Table 5: Bursary allocations for ITT for 2014/5

Bursary Tier	Degree Level	High priority areas					
		Physics, Maths	Computing	Chemistry	Languages	Secondary, Primary	Primary Maths Specialists
1	First*	£20,000	£20,000	£20,000	£20,000	£9,000	£11,000
2	2:1*	£20,000	£20,000	£15,000	£15,000	£4,000	£11,000
3	2:2*	£15,000	£15,000	£12,000	£12,000	ineligible	£6,000
4	Other	£9,000	ineligible	ineligible	ineligible	ineligible	ineligible

*Or equivalent as set out in equivalence data in Section 4 and 5

Source: National College for Teaching and Leadership, 2015: 8

Bursary recipients who hold the ITT scholarship are not eligible for an additional bursary. Bursary awards should be paid in equal monthly instalments over the duration of the course. The standard payment months for full-time courses are October to July of the academic year. The payment structure for bursary awards for different bursary amounts are provided in policy document, and are available for FE ITT and ITT. The examples provided below pertain to ITT.

Table 6: Bursary payment guidelines for different types of awards for full-time study

Bursary award	Payment schedule
£4,000	10 equal monthly instalments of £400, from October to July
£6,000	10 equal monthly instalments of £600, from October to July
£9,000	10 equal monthly instalments of £900, from October to July
£11,000	10 equal monthly instalments of £1,100, from October to July
£12,000	10 equal monthly instalments of £1,200, from October to July
£15,000	10 equal monthly instalments of £1,200, from October to July with additional payments of £1,500 in February and £1,500 in July or the final month in which the trainee completes the course
£20,000	10 equal monthly instalments of £1,400, from October to July with additional payments of £3,000 in February and £3,000 in July or the final month in which the trainee completes the course

Source: National College for Teaching and Leadership, 2015: 34 - 35

An advantage of spreading the payment across 10 months is that it helps students with financial planning and it also enables withdrawal of the bursary if students do not pass their exams. In this regard, the funding becomes a motivation for success. Guidelines are also provided for disbursing bursaries for part time students, as outlined below.

Table 7: Bursary payment guidelines for different types of awards for part-time study or modular courses

Bursary award	Payment schedule
£4,000	1. 2 equal payments of £2,000 at the start and end of the course or 2. 2 equal payments of £1,333 during the course plus 1 of £1,334 or 3. Flexible payment plan for modular course ensuring that no more than £2,000 is paid in one instalment
£6,000	4. 2 equal payments of £3,000 at the start and end of the course 5. 3 equal payments of £2,000 during the course 6. Flexible payment plan for modular course ensuring that no more than £3,000 is paid in one instalment
£9,000	7. 2 equal payments of £4,500 at the start and end of the course 8. 3 equal payments of £3,000 during the course 9. Flexible payment plan for modular course ensuring that no more than £4,500 is paid in one instalment
£11,000	10. 2 equal payments of £5,500 at the start and end of the course 11. 2 equal payments of £3,666 during the course plus 1 of £3668 12. Flexible payment plan for modular course ensuring that no more than £5,500 is paid in one instalment
£15,000	Flexible payment pattern of instalments, the total of which should not equal £12,000, with 2 additional payments of £1,500 at the end of the first half of the programme, and upon completion of the programme
£20,000	Flexible payment pattern of instalments, the total of which should not exceed £14,000, with 2 additional payments of £3,000 at the end of the first half of the programme, and upon completion of the programme

Source: National College for Teaching and Leadership, 2015: 36 - 37

Institutions are expected to manage payment to students and also to make necessary adjustments in case of withdrawals from courses. Bursaries are fixed for the duration of the course, and the emphasis is not only on attracting quality candidates but also on encouraging successful retention and completion of the course.

Monitoring

Policy provisions for monitoring of initial teacher training programmes apply for both FE ITT and ITT. Data is collected from multiple sources. Providers of training are responsible for keeping full records of all trainees receiving bursaries, including their academic qualifications before starting their ITT. Trainees must be in receipt of the degree on which they are assessed, prior to starting the course. The Department of Business, Innovation and Skills (BIS) and the National College for Teaching and Leadership (NCTL) can ask institutions for students' details at any point during the academic year, for monitoring, so records must be kept up to date. Because of the limitation of bursary funds, records and any updates must be submitted promptly to NCTL so that funds are released. Records received after the 15th of each month may be carried forward to the following month, and funding adjustments will be made to bursary payments for that month. Inaccurate or incomplete information will result in delays in disbursement of funds.

When a bursary recipient has been recruited in a school, the school is required to give partner data about itself to the partner ITT. The dates of training of the trainee are required for the monitoring. Bursary recipient data is collected via the Higher Education Statistics Agency (HESA) Initial Teacher Training In Year Record. Providers need to submit trainee level data. When the data has been imported into the HEI Data Management System (DMS) for each trainee, providers are expected to indicate the Lead School and up to five schools where the trainee will be undertaking their training during their ITT course, if they are in the School Direct initiative of initial teacher training. Providers who are not compliant with data requests may be deemed non-compliant and this can lead to withdrawal of accreditation, obliging a lead school to look for a new accredited provider. A system of submission of data by different agencies involved in the training is likely to provide accurate data because it is triangulated from the different sources.

The NCTL verifies bursary payments against bursary recipients' records, and where there are variances, for example, unclassified degrees, the NCTL seeks explanations from providers. Providers will bear the cost of any mistakes in the awarding of bursaries, for example, giving a higher bursary amount for specific specialisation than would be expected. Providers also keep data on applications, recruitment and employment outcomes, and they are required to share this on the School Direct hub, an online platform for people working in ITT to share their experiences and best practice.

Placement

The placement situation of the current bursary programmes is not clear, but in 2003, the evaluation of the FE ITT highlighted the placement difficulties of a bursary programme that did not do proper demand analysis to recruit beneficiaries. A constraint to the bursary programme during that period is that there were not enough college teachers to teach the priority areas, so colleges kept enrolment in courses like engineering and science to a minimum and enrolled many students in social science specialisations in subjects such as English, History, Psychology and Sociology, who ended up being unable to find permanent employment in FE because of the level of competition. Because these two bursaries are not service bursaries, students find their own jobs, and their placement would naturally depend on demand.

4. Key lessons and conclusions

The following lessons can be drawn from a review of the four bursary programmes:

Programme Design

- Bursaries are a useful way of addressing skills shortages and attracting academically talented people to train and fill the skills gap.
- Bursaries that are linked to skills shortage focus on not only attracting the right candidates, but retention and success are important. In this regard, placement of graduates is an important aspect of the bursary business process.
- Recruitment strategies have to be diverse and far reaching to attract large numbers of applications. The more applicants the better the pool to select the best students from. However, the downside of large volumes of applications is the administrative workload to sort them and select the right candidates, which may delay finalisation of the selection process.

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- The DAFF bursary and UK bursaries criteria for merit highlight standards that can be used for determining merit, for example, 60% for Maths and Physical Science for matric for the DAFF bursary, and the linking of various bursary amounts to various degree classifications in the UK. It is possible to use similar classifications for the PGCE programme, and offer differentiated bursary amounts based on graduate degree classification. This is likely to attract even better quality students as better degree classification equals a better bursary amount.
 - DAFF does not pay accommodation and meals for students who stay at home. Instead they get a travel allowance.
 - To avoid difficulties with students renegeing on their responsibilities, bursary conditions have to be specified upfront. The DSD and DAFF bursaries are good examples of clarification of conditions, as they have orientation meetings with bursary recipients where the conditions are elaborated and students get a chance to ask questions.
 - Other areas of redress are retention and success. The articulation gap between high school and university has been well documented in research, and students need to be supported to complete their programmes. DAFF's bursary programme has this component of student support, assessing the suitability of students' accommodation arrangements outside campus, and providing academic support through counselling and tutorial programmes. The UK bursary programmes emphasise the importance of a bursary not just to attract quality students but also to enable them to persist and succeed in their degree programmes
 - Bursary conceptualisation should involve national level policy structures as well as local government delivery structures, especially where placement is required. Multi-stakeholder involvement will also enable different sets of expertise for the successful implementation of the bursary. All bursaries reviewed involved collaboration between national structures and stakeholders at delivery points, e.g. providers, provincial departments, and schools etc.

Selection Criteria

- In South Africa, redress is an important consideration in offering bursaries, therefore even where students are recruited on merit, it is important to give preference to students from low socioeconomic backgrounds. In this regard, a means test as implemented by DSD is useful as this promotes access to higher education by poor students.
- In the pursuit of quality, what is meant by quality ought to be explicitly articulated. For the DSD, the issue of passion for the job is highlighted, although this is difficult to measure. The UK programmes have indicated other important qualities for example experience working with young people, social awareness, problem solving skills, planning and organisational skills. The only criterion that can be evaluated on paper are results, and others can be discerned through interviewing and engaging with applicants.
- It is important for students to be accepted by a university before they apply for any bursary. They need to meet university admission criteria first, and any bursary will not convince the university to enrol them if they do not meet the admission criteria.
- Sometimes academic results alone are not sufficient in determining the quality of students. In the UK, the bursary programmes make use of written tests as well as interviews for the

selection of students. This way they are able to assess for other qualities that can make a good teacher.

Operations

- Policy guidelines are an important lever for implementation of a bursary programme, as they can set out the parameters and scope of the bursary, and provide an accountability mechanism should stakeholders be in breach.
- Determination of bursary amounts is important especially in contexts where many students do not access higher education because of financial constraints. In such contexts, it is commendable to employ financial prudence so that bursary budgets can fund more students. At the same time, it is important to give full cost bursaries so that students can persist with their studies and graduate successfully. The DAFF allocation of funds for the bursary is useful for structuring bursaries. The bursary is split into two – there is a portion for fees and accommodation and books; then another portion for meals and subsistence. If there is any money left over from the fees, book and accommodation account, it is returned to the NSFAS, but any money left over at the end of the year from the subsistence portion will be given to the student.
- Another way in which the bursary expenditure can be controlled is to determine the cost of private accommodation based on the going rates for university accommodation. This will avoid defrauding of bursary funds if students collude with landlords to charge more for private accommodation.
- A longer placement period does not necessarily solve placement problems. DSD has a three month period in which to place students before they are released of any obligation with the bursary, but some graduates are still not placed after this time. What is needed is a systemic approach to placement which has buy in from all stakeholders involved in the placement and receiving process.
- Disbursement of bursary funds in instalments helps students with their financial planning.

Planning

- Demand and supply analysis is a crucial element of bursary programmes, as students have to be placed as a cost effective measure. So, it is useful to know exactly what the priority areas are to recruit students, and what the numbers needed are so that students can be successfully placed when they graduate.
- Monitoring data is required as a mechanism to ensure accountability in the implementation of the bursary programme. The UK examples, where all stakeholders are responsible for providing monitoring data to a central management system, keeps all stakeholders informed and provides opportunities for getting more reliable data that can be triangulated because it is from multiple sources.