



ANNUAL PERFORMANCE PLAN

2021 / 22



UMALUSI

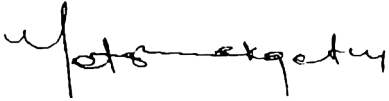


Quality Council for General and Further
Education and Training

EXECUTIVE AUTHORITY STATEMENT

The year 2021 marks the second year in the implementation of Umalusi's five-year strategic plan. The 2021/22 Annual Performance Plan (APP) is guided by the National Development Plan, priority 3 of the Medium-Term Strategic Framework 2019-2024 "education, skills and health", the Department of Basic Education's Sector Plan "Towards Schooling 2024" and other relevant policies of government. Umalusi, as a quality council in the general and further education and training, is mandated to maintain high quality standards in the basic education sector.

Given the current constraints occasioned by the COVID-19 pandemic, the Accounting Authority, Umalusi Council, will monitor the implementation of this plan through quarterly performance reports to identify service delivery successes and challenges, and to advise management on how to move forward.



Mrs Angie Motshekga: MP
Minister of Basic Education

ACCOUNTING AUTHORITY STATEMENT

Umalusi remains committed to ensuring that South Africa's educational standards are enhanced to promote quality education, as required by the National Development Plan. The Medium Term Strategic Framework (MTSF) priority number three provides guidelines for government's intentions on education, in which Umalusi plays a critical role in quality assurance of the education sector. The Umalusi 2021/22 Annual Performance Plan (APP) is the second in the Mid Term Strategic Framework 2019–2024.

As the Chairperson of Umalusi Council, I have confidence in the ability of management to fulfil the organisational legislative mandate. The Council will provide full support to management in ensuring that the 2021/22 annual performance priorities are achieved. It will play its role to hold management accountable for the attainment of the targets and outputs outlined in this plan.

The Council acknowledges that, given the current economic climate and the impact of COVID-19, Umalusi must exercise financial prudence in discharging its responsibility as a statutory body. For this reason, Council will strive to foster a clean administration that upholds high ethical standards. Council is delighted by the attainment of a clean audit for the 2019/20 financial year. It is important to maintain this performance; therefore, Council will strive to ensure that financial resources are utilised with the utmost care and that good corporate governance is enforced. In addition, Council will play its oversight role through its various committees, using checks and balances to monitor and ensure achievement of the outputs outlined in the plan.

Council endorses the 2021/22 APP and undertakes to support the Chief Executive Officer and his team as they continue to focus on the mandate of Umalusi as a quality council.



Professor John D Volmink
Umalusi Council Chairperson

ACCOUNTING OFFICER STATEMENT

I am delighted to inform our stakeholders that Umalusi obtained a clean audit for the 2019/20 financial year, which was the last financial year in the MTSF 2014–2019. We credit this achievement to several rigorous organisational systems, including financial management, performance monitoring, good corporate governance and the ability to achieve the targets that we set for ourselves. We are aiming to maintain this outcome in the new MTSF 2019–2024.

The organisation has automated some core operational systems and processes to ensure effectiveness and efficiency in service delivery. The organisation has been able to continue operating during the most dangerous period of the COVID-19 pandemic, as a result of leveraging developments in information and communication technology. To this end, this 2021/22 APP outlines the outputs and targets for all units, to ensure Umalusi remains true to its legislative mandate.

Among the key focus areas to be implemented during this financial year are the following:

- i. review the General and Further Education and Training Qualifications Sub-framework (GFETQSF) and associated policies;
- ii. benchmark the National Senior Certificate (NSC) against selected international qualifications;
- iii. alignment of qualifications to the GFETQSF;
- iv. conduct research on quality assurance of the General Education and Training Certificate for Adults (GETCA), National Senior Certificate for Adults (NASCA) and the General Education Certificate (GEC);
- v. appraise intended curricula and assessed curricula (NASCA and GEC);
- vi. articulation of the GEC and qualifications registered on the Occupational Qualifications Sub-framework (OQSF);
- vii. reconfigure quality assurance of school-based assessment (SBA);
- viii. implement the process of non-certification of learners who write the NSC examination at non-accredited independent schools; and
- ix. implement the process of non-certification of learners who write the National Education (NATED) Report (190/191) N1-N3 Engineering Studies and National Certificate (Vocational (NC(V)) examinations at non-accredited private colleges.

I can assure Umalusi stakeholders that the executive management has made a commitment to implement this APP, with the assistance of staff, to achieve the desired results. Consequently, the plan will be implemented through the 2021/22 operational plan and the quarterly reviews will be used to monitor the performance of each unit in achieving the set targets.



Dr Mafu S Rakometsi
Chief Executive Officer

OFFICIAL SIGN-OFF

It is hereby certified that this Annual Performance Plan:

- was developed by the management of Umalusi under the guidance of the Umalusi Council;
- takes into account all relevant policies, legislation and other mandates for which Umalusi is responsible; and
- accurately reflects the outcomes and outputs that Umalusi will endeavour to achieve in the period 2021/22.

Mr Emmanuel Sibanda
Executive Manager:
Qualifications and Research

Signature:



Mrs Zodwa Modimakwane
Executive Manager:
Quality Assurance and Monitoring

Signature:



Mr Dumisani Maluleke
Acting Chief Financial Officer

Signature:



Mrs Stella B Mosimege
Senior Manager:
Strategy and Governance

Signature:



Dr Mafu S Rakometsi
Chief Executive Officer

Signature:



Prof John D Volmink
Umalusi Council Chairperson

Signature:



Approved by:
Mrs Angie Motshekga: MP
Minister of Basic Education

Signature:



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ACCRONYMS AND ABBREVIATIONS

ABET	Adult Basic Education and Training
AET	Adult Education and Training
APP	Annual Performance Plan
ASC	Assessment Standards Committee
BAA	Benchmark Assessment Agency
CEO	Chief Executive Officer
CFO	Chief Financial Officer
CS	Corporate Support
DBE	Department of Basic Education
DHET	Department of Higher Education and Training
ECD	Early Childhood Development
E&A	Evaluation and Accreditation
FET	Further Education and Training
F&SCM	Finance and Supply Chain Management
GEC	General Education Certificate
GENFETQA	General and Further Education and Training Quality Assurance
GETCA	General Education and Training Certificate for Adults
GETC	General Education and Training Certificate
GFETQSF	General and Further Education and Training Qualifications Sub-Framework
OCEO	Office of the Chief Executive Officer
HCM	Human Capital Management
IaaS	Infrastructure as a Service
ICASS	Internal Continuous Assessment
ICT	Information and Communication Technology
IS	Independent Schools
MIS	Management Information System
MTSF	Medium Term Strategic Framework
NASCA	National Senior Certificate for Adults
NATED	National Education Report 190/191
NC(V)	National Certificate (Vocational)
NCS	National Curriculum Statements
NEPA	National Education Policy Act
NQF	National Qualifications Framework
NSC	National Senior Certificate
OQSF	Occupational Qualifications Sub-framework
PPE	Personal Protective Equipment
PR&COMMS	Public Relations and Communications
PSQ	Post-School Qualifications
QAA	Quality Assurance of Assessment
QAM	Quality Assurance and Monitoring
QCC	Qualifications, Curriculum and Certification
Q&R	Qualifications and Research
RPL	Recognition of Prior Learning
SAFCERT	South African Certification Council
SAQA	South African Qualifications Authority
SASA	South African Schools Act
SACAI	South African Comprehensive Assessment Institute
SC(a)	Senior Certificate (amended)
S&G	Strategy and Governance
SQ	School Qualifications
SIR	Statistical Information and Research
TVET	Technical and Vocational Education and Training



PART A

Our Mandate

1. LEGISLATIVE AND POLICY MANDATES

1.1 Founding legislation

i. National Qualifications Framework (NQF) (Act No. 67 of 2008)

The NQF Act, 2008 provides for the establishment of Umalusi as a quality council that is responsible for the development and management of a sub-framework of qualifications at levels 1–4 of the NQF and related quality assurance processes. In terms of paragraph 27 of the NQF Act, Umalusi must do the following in respect of quality assurance:

- a. develop and implement policy for quality assurance;
- b. ensure the integrity and credibility of quality assurance; and
- c. ensure that quality assurance as is necessary for the sub-framework is undertaken.

ii. The General and Further Education and Training Quality Assurance Act (GENFETQA) (Act No. 58 of 2001), as amended in 2008

The GENFETQA Act, as amended, assigns Umalusi responsibility for quality assurance of general and further education and training. Umalusi was established with the purpose of maintaining norms and standards in general and further education and training. Its mandate is confirmed as follows:

- a. developing and maintaining a sub-framework of qualifications for general and further education and training;
- b. quality assurance of all exit-point assessments of such qualifications;
- c. certification of learner achievements;
- d. quality assurance of private education institutions; and
- e. accreditation of private assessment bodies.

Further, the Act assigns responsibility to Umalusi for the quality assurance of independent schools through chapter 3, 23(2)(a). With respect to private provision, Umalusi is required to undertake the following accreditation responsibilities:

- a. develop policy, which must be regulated by the Minister, for the accreditation of private assessment bodies other than departments of education, and accredit assessment bodies accordingly;
- b. develop policy and criteria for the quality assurance of private education institutions including independent schools, private colleges and private adult education and training (AET) centres;

- c. ensure that any institution required to register as an independent school, private further education and training (FET) college and private adult basic education and training (ABET) centre complies with the quality assurance policy and criteria determined by Umalusi; and
- d. affirm, or withdraw, accreditation status of the private education institution concerned.

1.2 Other legislation

- National Education Policy Act (NEPA) (Act No. 27 of 1996);
- South African Schools Act (SASA) (Act No. 84 of 1996), as amended; and
- Continuing Education and Training Act (Act No. 16 of 2006), as amended.

2. INSTITUTIONAL POLICIES AND STRATEGIES OVER FIVE-YEAR PERIOD

Umalusi's qualifications' sub-framework must be read in conjunction with the following policy documents:

- the General and Further Education and Training Qualifications Sub-framework: 2014;
- Guidelines on Strategy and Priorities for the NQF 2011/2012: Minister of Higher Education and Training;
- national policies governing existing qualifications (including their assessment) that are currently certificated by Umalusi;
- standard setting and quality assurance of the General and Further Education and Training Qualifications Sub-framework: Umalusi, 2014;
- policy documents and guidelines pertaining to the NSC, Senior Certificate (amended) (SC(a)), General Education and Training Certificate (GETC), National Certificate (Vocational) (NC(V)), National Education Report 190/191 (NATED) and the national curriculum statements (NCS); and any other qualifications on the GFETQSF, as applicable;
- Council policies and directives on the conduct, administration and management of the assessments for qualifications on the GFETQSF;
- the regulations pertaining to qualifications on the GFETQSF developed by the Department of Basic Education (DBE) and gazetted by the Minister on assessment and certification, including those promulgated by provincial legislatures and the policy framework that applies to all technical and vocational education and training (TVET) colleges

declared or established by the Minister under the Continuing Education and Training Act, No. 16 of 2006;

- Treasury Regulations; and
- any other related legislation as appropriate to the various education and training sectors in which Umalusi is mandated to work.

3. RELEVANT COURT RULINGS

- 3.1 Case 64171/2020 between Lienke Spies, Gerhard Burger, Izak Jacobus Arnold, Christiaan Swanepoel, Afriforum NPC and the Department of Basic Education where Umalusi was the third respondent;
- 3.2 Case 64222/2020 between Unami Phiwokuhle Bhembe, Itumeleng Samkelo Nkambule, Marné van der Merwe and the Minister of Basic Education where Umalusi was the fourteenth respondent;

- 3.3 Case 64373/2020 between Itha Wessels, Eesa Omar, Pheelo Moeketsi, Alanis Lisbel Medina Gomes, Nomonde Radebe and the Minister of Basic Education where Umalusi was the second respondent; and
- 3.4 Case 58905/2020 between the South African Demographic Teachers Union and the Minister of Basic Education where Umalusi is the twelfth respondent;

The High Court ruled that the decision to have the Mathematics Paper 2 and Physical Science Paper 2 was irregular and unlawful and should be set aside.





PART B

Our Strategic Focus

1. UPDATED SITUATIONAL ANALYSIS

The organisational environment was assessed using the SWOT (Strengths, Weaknesses, Opportunities and Threats) and PESTEL (Political, Economic, Social, Technological, Environmental and Legal) analysis tools to develop priorities and measures of improvement for the new APP. The 2021/22 financial year is expected to start during the prevalence of the pandemic, according to medical scientists' predictions. However, this will not prevent Umalusi from fulfilling its mandate as a quality council. The 2021/22 APP outlines key organisational projects for the year and enhanced measures for accomplishing the priorities outlined in the five-year strategic plan. These priorities came about through reflection on the organisational strategic plan and assessment of the progress made in 2020. The priorities aim to identify service demands and limitations in relation to the achievement of organisational outcomes, together with their outputs.

The 2021/22 financial year marks the second year of the current five-year term wherein the organisation will continue implementing its priorities set for the five-year term. To realise the desired outcomes and impact, the strategic focus of the organisation remains:

- reviewing the quality assurance approach in view of the budget cuts and the COVID-19 impact;
- continued evaluation of qualifications on the Umalusi sub-framework and appraising the relevant curricula;
- actively participating in the processes of amending the founding Acts to accommodate new qualifications;
- intensifying research on educational developments to provide evidence-based advice to the Ministers of Education; and
- intensifying the advocacy to communicate accurate and relevant messages to all stakeholders on issues relating to qualifications on our sub-framework.

2. EXTERNAL ENVIRONMENT ANALYSIS

2.1 The impact of COVID-19

The COVID-19 pandemic resulted in service interruptions globally, including South Africa. The South African economy has been severely impacted by the lockdown measures. Many governments across the globe, including South Africa, implemented lockdown regulations to flatten the curve of the pandemic. However, these

lockdown regulations could not stop the major and irreparable effect of the pandemic, which is loss of life. The lockdown resulted in halting certain economic and social activities. Other implications included loss of jobs, loss of profit, reduced operating hours and closing of some markets. Government institutions had to reconsider and reprioritise their resources with the aim of cutting budgets in certain projects to redirect funds to upscale the health budget.

2.1.1 Effects of COVID-19 on Umalusi

Education has been one of the sectors most severely affected by COVID-19. The national lockdown level 5 resulted in the closure of all education institutions. Consequently, the academic calendars of schools and tertiary institutions were adjusted, which led to the cancellation of the June examinations and their merging with the November examinations. As a key role player in the national education system, Umalusi also had its share of COVID-19 challenges. The national lockdown restrictions on travelling had negative effects on site visits to evaluate and accredit private education institutions. Additionally, Umalusi had to cancel internal continuous assessment (ICASS) in the first quarter. Furthermore, the organisation experienced a backlog in the certification process as some assessment bodies were not fully operative and some were unable to submit required additional information.

2.1.2 Measures to mitigate the impact of COVID-19

Umalusi plays a key role in the national education system as the quality council responsible for general and further education and training. Despite the threats that come with the pandemic, Umalusi is committed to continuing to enhance educational standards during this period. Umalusi will continue to seek and implement measures that ensure quality service delivery during the 2021/22 financial year. These include adjusting its quality assurance plan to align with the school calendar, implementing systems to ensure social distancing is maintained, providing PPE for all staff members, ensuring that contract workers adhere to strict protective measures in their work, resuming site visits and conducting on-site moderation of question papers.

During the 2020/21 financial year it became evident that virtual meetings were effective in minimising travel, accommodation and catering costs, compared to physical meetings. Most meetings will, therefore, continue to be convened virtually to limit physical meetings and reduce the risk of infections. Umalusi will adjust its measures to align with the national government's risk-adjusted strategy.

2.2 Role and responsibilities

There has been a lack of clarity regarding some areas of Umalusi's role and responsibilities since its establishment as a quality council. This clarity is imperative if Umalusi is to have its intended impact in the education system. The amended NQF Act and ongoing review process will address some of the ambiguities. Umalusi is part of a consultative process that seeks perspectives and inputs from interested parties, affected groups and experts on the legislative procedures for the amendment of the NQF Act (Act No. 67 of 2008), the Act that established Umalusi as a quality council, along with other quality councils. Four workshops on the proposed amendments to the NQF Act have been conducted and comments have been provided. This process is being undertaken to ensure that Umalusi's role and responsibilities are clarified in the Act.

2.3 Policy performance

Umalusi's policy and performance environment is informed by changes in the education landscape, its needs and its challenges. Being the quality council largely responsible for basic education, the focus of Umalusi demands a constant and clear understanding of different education needs. Strategically, Umalusi uses research to understand education indices of quality, empowering itself to seek ways of ensuring that quality becomes the thread that permeates education delivery in South Africa. This is critical to ensure that qualifications in general and further education and training remain relevant and competitive in both the region and at international level. Hence, one of Umalusi's strengths is ensuring ongoing policy development to guide the organisation and assessment bodies that offer qualifications in this sub-framework.

Umalusi has developed an organisational policy for quality assurance of assessment (QAA) in the school, post-school and AET sectors. This policy is foremost in guiding implementation of one of the

organisation's core mandates, that of quality of assurance.

A proposal on the draft policy on admission requirements for admission to higher education has been submitted to the Department of Higher Education and Training (DHET) for inputs.

2.4 Performance environment

2.4.1 Review of the quality assurance approach

Due to the lockdown, the organisation developed an e-standardisation portal that enables the Assessment Standards Committee (ASC) to conduct the standardisation process remotely. The portal represents a cost saving as there will not be a need for accommodation and catering during meetings. In addition, a QAA reporting portal has been developed. This will enable the online development and editing of QAA reports and minimise delays in completing report chapters. Quality promotion meetings, a compulsory step in the evaluation and accreditation process, previously held face-to-face meetings across the country at a cost to both Umalusi and the institutions. These are now conducted successfully through virtual meetings. Proposals for virtual site visits and virtual accreditation forums are also under way.

While these approaches may have been developed because of COVID-19, the organisation is mindful that it needs to continue to be innovative in carrying out its quality assurance processes, post COVID-19.

2.4.2 Use of Umalusi communication platforms by stakeholders

The organisation has managed to sustain a steady growth of its main digital media platforms, Facebook (UmalusiSA) and Twitter (@UmalusiSA). Table 1 below shows the growth of these platforms in the past five years:

Table 1: Use of digital media by stakeholders

Digital Media Platform	Number of Subscribers Five Years Ago	Current Number of Subscribers
Facebook	111	18 848
Twitter	32	5 075

The subscription numbers provided in Table 1 indicate the potential circulation spread of stakeholders who have access to and are accessible via these platforms. In 2019 and 2020 the organisation introduced new digital media

platforms, YouTube (UmalusiSA) and LinkedIn. For the current MTEF period, the organisation will adopt an aggressive content generation strategy to keep all stakeholders on these platforms informed about the work of the Umalusi.

2.4.3 Qualifications, Certification and Verification

Certification is the formal recognition of a qualification, or part-qualification, awarded to a successful candidate. To fulfil its mandate, Umalusi issues

certificates to all candidates who have qualified and complied with the requirements for a qualification. The number of certificates issued in the period 2017–2019 are reflected in Table 2.

Table 2: Number of certificates issued per financial year (2017–2019)

Qualification	2017/18	2018/19	2019/20
National Senior Certificates	768 520	827 889	626 633
Senior Certificate (amended)	43 850	61 283	55 003
Senior Certificate	39 084	29 702	27 967
National Certificate (Vocational)	182 164	191 043	58 149*
Report 190/191NATED	98 640	41 746*	27 065*
General Education and Training Certificate	50 678	90 616	78 663
TOTAL	1 182 936	1 242 279	873 480

*At the request of the DHET the printing of subject statements for candidates was phased out and these are printed only on request. This explains the drop in the number of certificates issued for NC(V) and Report 190/191 NATED in 2018/19 and 2019/20.

Verification

Verification is the process followed by Umalusi to establish the authenticity of qualifications/certificates. Verification includes authenticating the qualification document and verifying that the

qualification was awarded to the individual in question; and that the content corresponds with the details on the Umalusi certification database. Requests for verifications are completed in two working days, including feedback to the verification clients. Verification trends for the past three years are reflected in Table 3.

Verification of qualifications has remained relatively constant for the last three years.

Table 3: Number of verifications per financial year (2017–2019)

Number of verifications (2017–2019)				
Year	Manual	E-verification	Full verification	Total
2017/18	4 341	238 190	16 804	259 335
2018/19	4 571	257 746	17 237	279 554
2019/20	4 581	250 510	17 008	272 099

2.4.4 Quality Assurance of Assessment

As one of its core mandates, Umalusi has, since its inception, quality assured assessment processes for all qualifications on its sub-framework. This function takes on many forms and includes moderating question papers, monitoring institution-based assessment, monitoring the writing of examinations at various centres, monitoring marking, the verification of marking, auditing the

state of readiness of assessment bodies to conduct examinations, as well as other related quality assurance activities. These activities are done for all qualifications on the GFETQSF across all assessment bodies, DBE, DHET, Independent Examinations Board (IEB), South African Comprehensive Assessment Institute (SACAI) and Benchmark Assessment Agency (BAA). Figures 1 to 4 show some of the work done by Umalusi in the last three years.

Figure 1 indicates the moderation of question papers conducted by Umalusi from 2017 to 2020. The organisation moderates question papers to ensure that they meet quality assurance requirements and are fair, reliable and representative of the relevant levels of cognitive challenge. Question papers

moderated for post-school qualifications have been constant in the last three years; however, the observed drop in the number of question papers in the schooling sector was due to the cancellation by the DBE and the IEB of the March supplementary examinations.

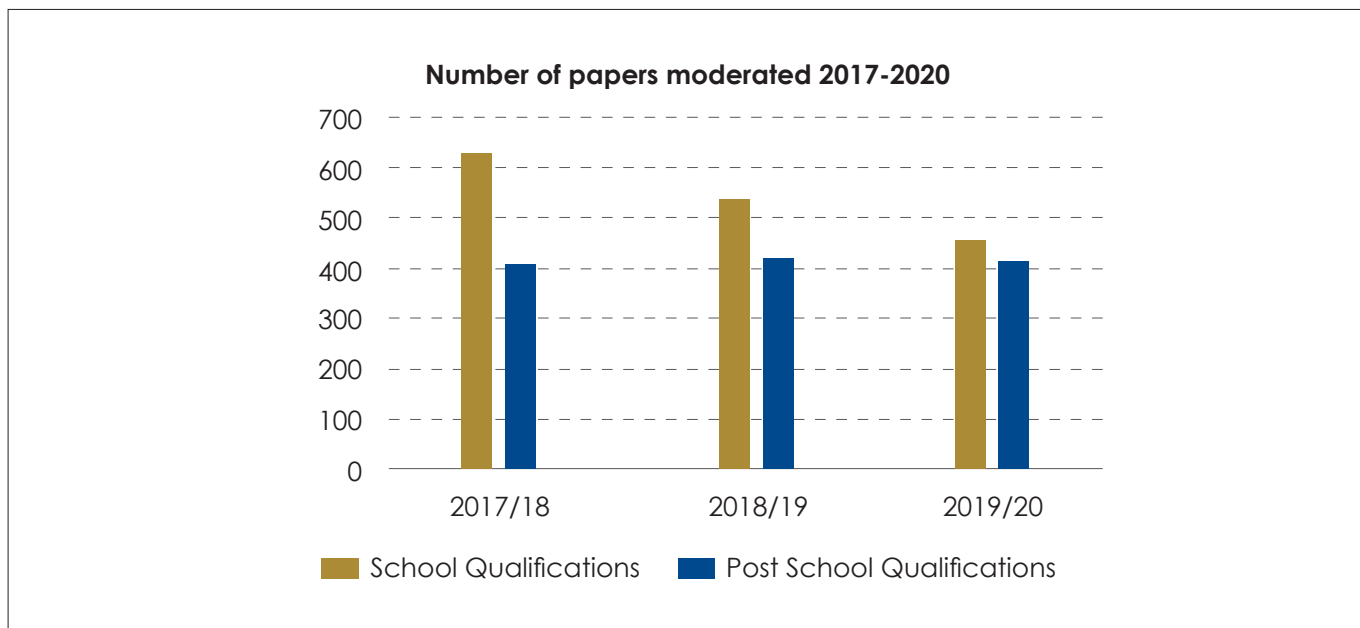


Figure 1: Number of question papers moderated (2017–2019)

Figure 2, which summarises the monitoring of marking conducted in the past three years, shows that monitoring of marking centres for schools increased up to 2018 and decreased in 2019. This was because monitoring of the NC(V) and NATED marking centres was done and categorised under

post-school qualifications. In contrast, in the post-school sector, the number of institutions monitored was constant, at around 60. This work is done to ensure the integrity and credibility of the marking process.

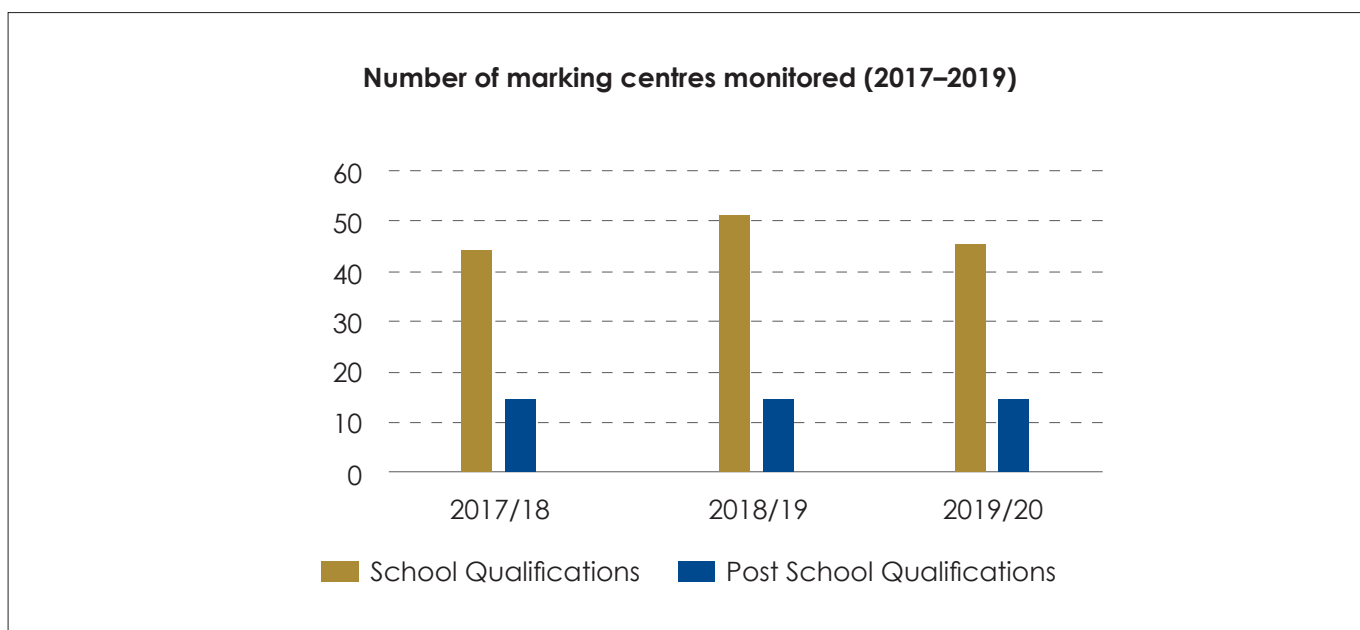


Figure 2: Number of marking centres monitored (2017–2019)

Figure 3 summarises the verification of marking conducted in the past three years.

This quality assurance process ensures that marking is credible and accurate. In the last three years marking verification was done for a constant

number of subjects for school qualifications. The number of subjects selected for verification of marking decreased in the third year because the DBE and IEB had no supplementary examinations in that year.

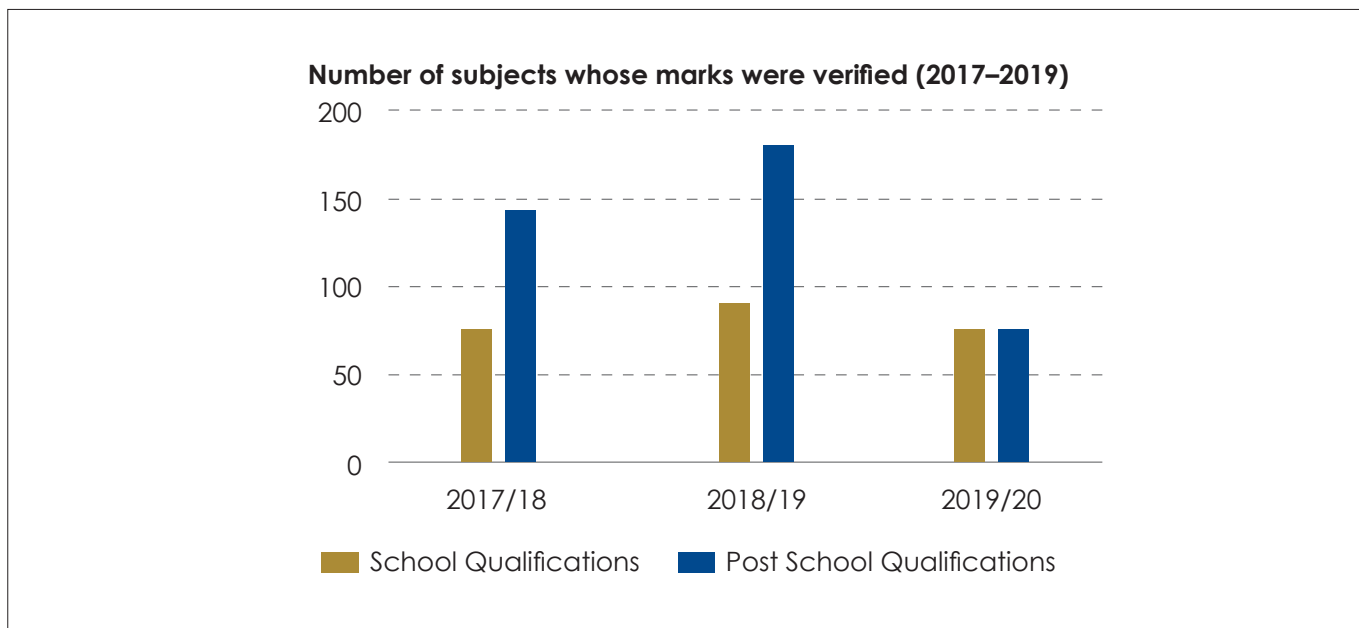


Figure 3: Number of subjects whose marks were verified (2017-2019)

In terms of monitoring the writing of examinations, Umalusi gradually extended its coverage to assess the level of compliance by institutions. The gradual and annual increase in the number of monitored examination centres for school qualifications has enhanced and improved the compliance levels of institutions in the conduct, administration and

management of the NSC examinations. Monitoring of the writing of examinations of the post-school sector was relatively low as a result of unavailability of a dedicated monitoring team and reliance on the school monitoring team. Figure 4 summarises the monitoring of examinations conducted over the past three years.

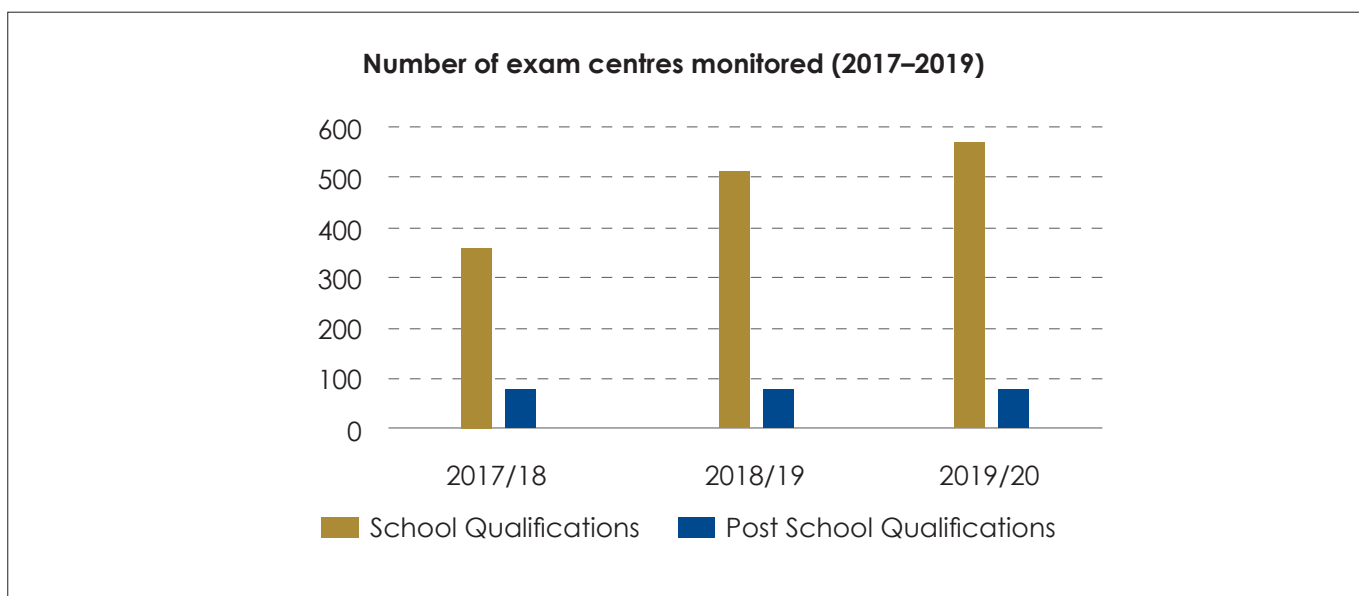


Figure 4: Number of examination centres monitored (2017-2019)

2.4.5 Evaluation and Accreditation

In accrediting private education institutions, Umalusi ensures that section 29(3)(c) of the South African Constitution is upheld: that independent educational institutions “maintain standards that are not inferior to standards at comparable public

educational institutions”. In so doing, the citizens of South Africa can rest assured that the provision of education at accredited private education institutions meets the required standards. Accreditation outcomes for the three types of education institutions for the past three years are reflected in Table 4 and Figure 5.

Table 4: Accreditation Outcomes 2017-2019

	Seven years' accreditation			Two years' provisional accreditation			No accreditation			Window period to improve		
	IS	FET	AET	IS	FET	AET	IS	FET	AET	IS	FET	AET
2017/18	142	24	6	66	44	5	22	9	7	67	27	7
2018/19	129	37	3	72	42	11	44	4	5	115	21	6
2019/20	130	18	1	88	26	0	57	19	5	170	20	0
TOTAL	401	79	10	226	112	16	123	32	17	352	68	13
Total	490			354			172			433		
	34%			24%			12%			30%		

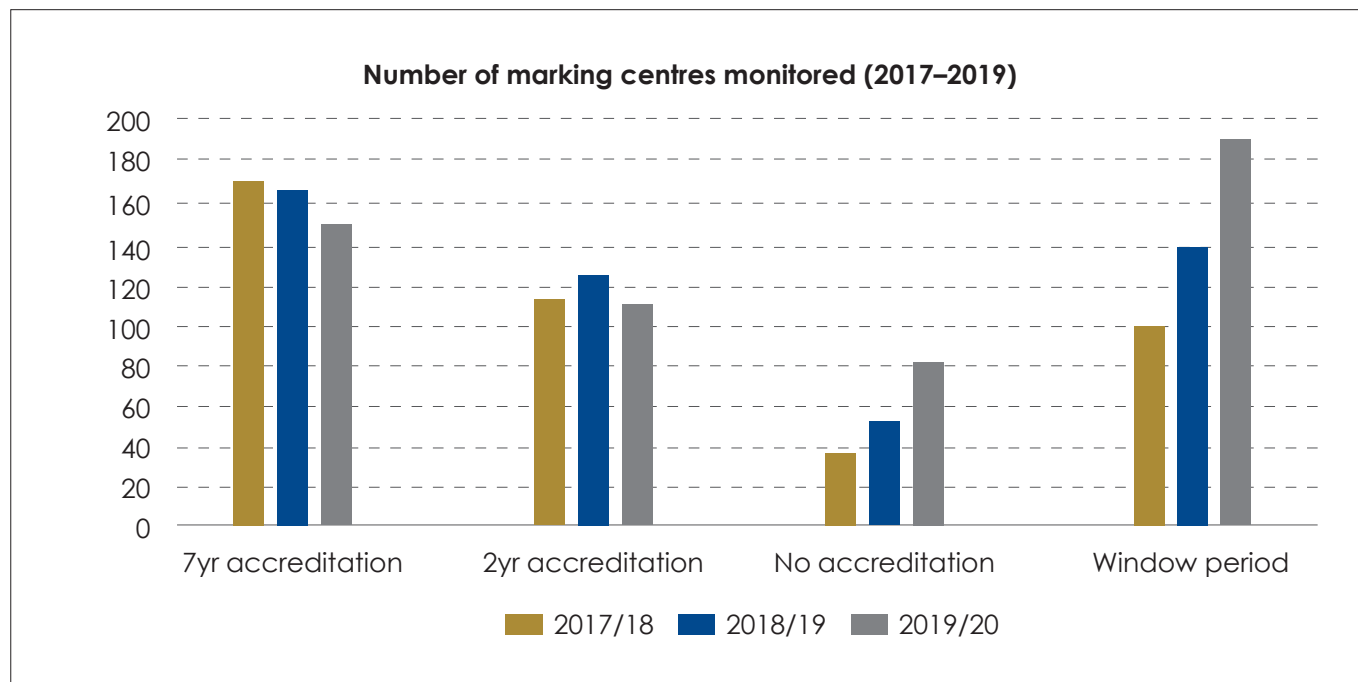


Figure 5: Accreditation outcomes (2017–2019)

Overall, more institutions have been granted seven-year accreditation status: it is satisfying to note that just more than one-third (34%) of institutions have achieved seven-year accreditation. The slight decrease in 2019 was because most institutions have now been accredited; this number is expected to continue to decrease over time. More schools are increasingly being given a window period to improve each year (an average of 30%), indicating that these institutions have minor issues to address before being awarded accreditation status. Just under one-quarter of the institutions (24%) have two-year accreditation, while only 12% are not yet accredited. This is an indication that,

increasingly, more institutions are adhering to the criteria set for offering Umalusi qualifications.

2.5 Demand for service

2.5.1 Evaluation and appraisal of new qualifications

The General Education Certificate (GEC) qualification was evaluated and recommendations made for consideration by the DBE. The policy on the qualification will be gazetted in March 2021, once the qualification has been finalised and registered with the South African Qualifications Authority (SAQA).

Umalusi appraised the intended content/subject curricular of the National Senior Certificate for Adults (NASCA) in 2015 and awaits the submission of the final Afrikaans and African languages curricula for appraisal. A clear process of how the NASCA quality assurance processes will unfold during this five-year term is yet to be developed.

2.6 Challenges

Umalusi is a not self-sustaining organisation; it depends on the allocation of a grant from the DBE. The organisation renders services within limited financial resources and, in view of the projected government budget cut, Umalusi's mandate will be most severely affected. The organisation will have to prioritise its functions to ensure alignment with the allocated budget. During the national lockdown, the organisation has not done well in terms of debt collection. It will have to improve in this area to supplement its constrained budget.

Other challenges for Umalusi were those related to COVID-19 where a number of functions could not be carried out as originally intended. However, the organisation has innovated in several areas to continue operating and delivering service to its clients, by leveraging available technological advancements. The organisation has developed systems to support business unit operations and this trend is bearing fruit in cost savings, considering that the budget has been cut for this MTEF period.

2.7 Empowerment of women, youth and people with disabilities

In terms of Umalusi functions, policy requirements are relaxed for learners with disabilities. The Umalusi Credit Accumulation and Transfer Policy

makes it possible for NSC learners to be credited with some NC(V) subjects, which contributes towards achieving the qualification. Additionally, the organisation empowers designated groups through its Supply Chain Management processes of procurement. The evaluation criteria awards points for designated groups in accordance with policy. Secondly, recruitment processes do not discriminate against these groups: 52.2% of Umalusi's employees are women, which is above the set target of 44%. Women occupy 53% of senior management services positions. The youth category is represented by 43 employees, 32% of Umalusi's staff establishment. Young staff are also empowered through the provision of bursaries to upgrade their qualifications and advance their careers.

3. INTERNAL ENVIRONMENT ANALYSIS

3.1 Organisational structure

Umalusi is a Schedule 3A entity with a staff establishment of 140. The management structure is comprised of the Chief Executive Officer (CEO), three executive managers including the Chief Financial Officer (CFO), and ten senior managers. The organisation is divided into three branches: Administration, Qualifications and Research and Quality Assurance and Monitoring. The organisation created an executive manager's position, which could not be filled because of a budget cut during the year. This is an indication of the impact of the economy on the organisation. As a result, the challenge of the CFO's workload has not been resolved and the organisation must apply other strategies, such as business process re-engineering, to manage its internal operations. Figure 6 depicts the configuration of the organisation.

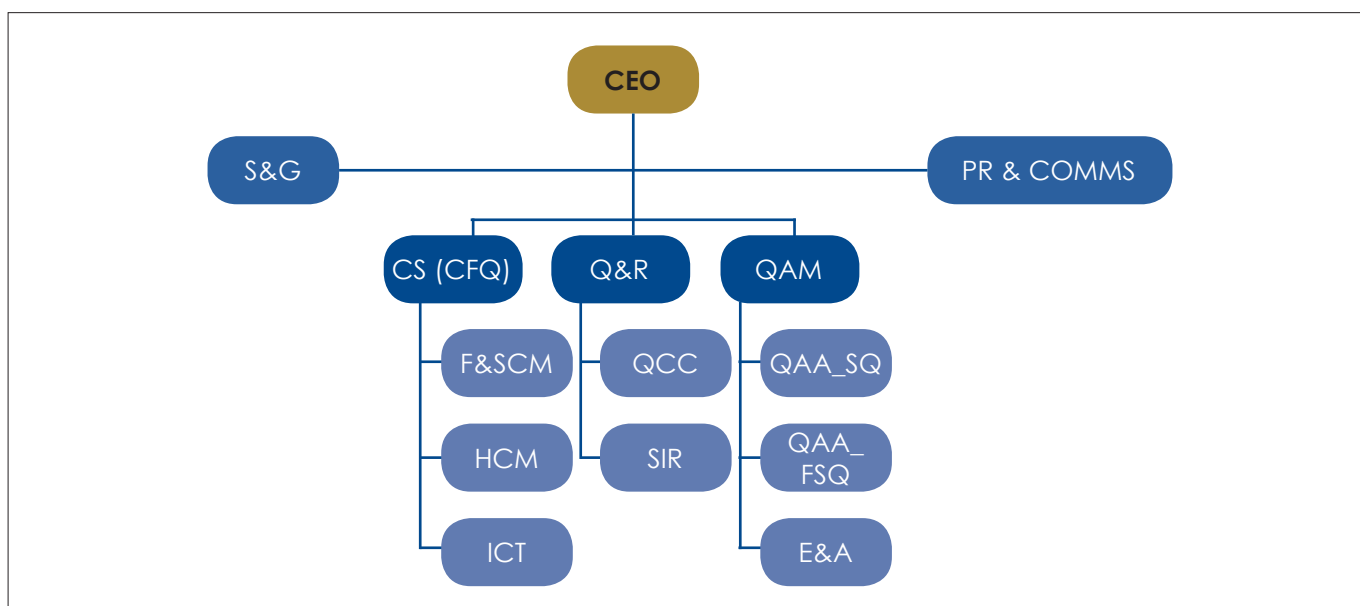


Figure 6: Umalusi's organisational structure

3.2 Human resource capacity of the organisation to achieve its mandate

Umalusi set itself a target of maintaining a vacancy rate below 10% annually. The organisation has,

since 2017 to date, been successful in reducing its vacancy rate. Figure 7 reflects a vacancy rate decrease of 20% in a period of five years (2015/16 to 2019/20). The organisation depends on human resources to provide services to the nation; hence, there is a need to fill vacant posts urgently.

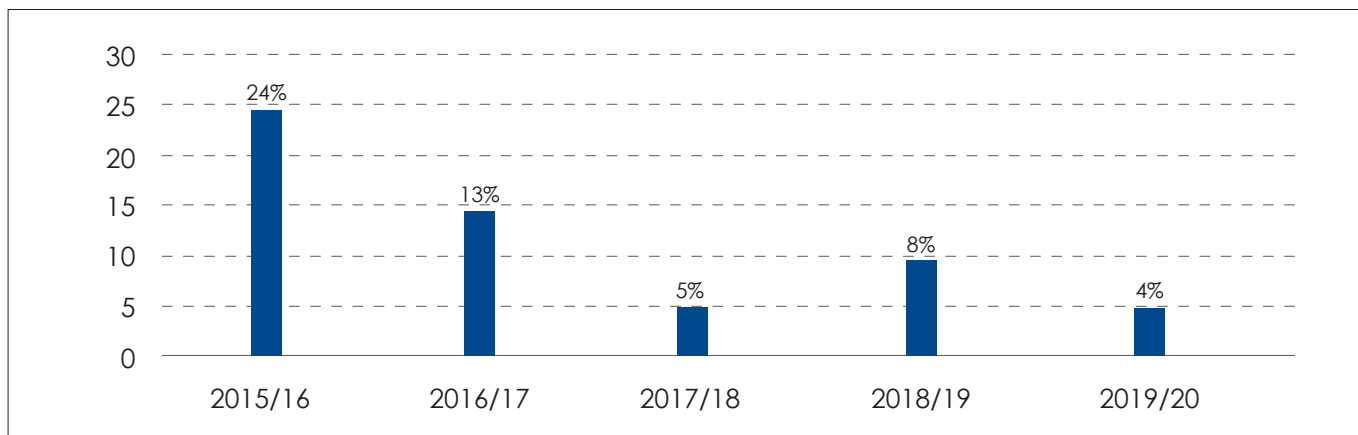


Figure 7: Organisational vacancy rate for the past five years

Although the vacancy rate appears to be positive, the workload in the organisation remains challenging as its mandate continues to grow. It is evident that the implementation of the new qualifications will require additional human resources to carry the workload required to enhance educational standards. Umalusi, therefore, needs to critically assess its human resources capacity to deliver on its mandate. In addition, seeking an alternative revenue source is urgent to ensure that the staff establishment is aligned to the work to be performed.

3.3 Facilities

The plan to refurbish Umalusi 41 (the new building) is under way; however, the project was halted at the beginning of the lockdown. In the interim, two business units have moved to the new building to occupy space that was previously leased to other companies. This has eased the pressure on office space in Umalusi 37, a critical issue given the need to always adhere to social distancing measures.

3.4 Financial resources

Umalusi obtained an unqualified audit opinion with no material findings (a clean audit) for 2019/20. This was a major improvement for the organisation, made possible by the collective effort of the organisation's staff.

The South African economy has not been growing. The impact of COVID-19 has resulted in budget cuts across all government-funded organisations. In June 2020, public institutions were advised to revise their plans and to reprioritise their budgets. Budget reprioritisation has seen many institutions directing

their finances towards procurement of personal protective equipment (PPE). Umalusi ensured that its budget accommodated the procurement of ICT equipment and development systems that enable employees to work remotely.

The organisation continues to execute its mandates within its limited resources. The credibility of Umalusi qualifications is, however, on the line, if the organisation cannot attract sufficient funding to carry out its functions. The organisation must strengthen its debt collection mechanisms to supplement its budget.

3.5 Information and Communication Technology

The organisation's ICT network health score is continuously maintained at 95% and above to ensure smooth operation and to secure organisational information. The ICT systems created an enabling environment for service delivery and protection of the organisation's information during the national lockdown. Umalusi's mailboxes have been migrated to Microsoft Office 365, which is cloud-based. Microsoft Office 365 enables Umalusi staff to work together in a secure way and from anywhere.

Umalusi has implemented a vulnerability management solution to secure the organisation's information. Most meetings are currently being conducted virtually. The website is hosted internally, representing a cost saving to the organisation. Umalusi employees have been provided with ICT equipment and data to be able to work from home.



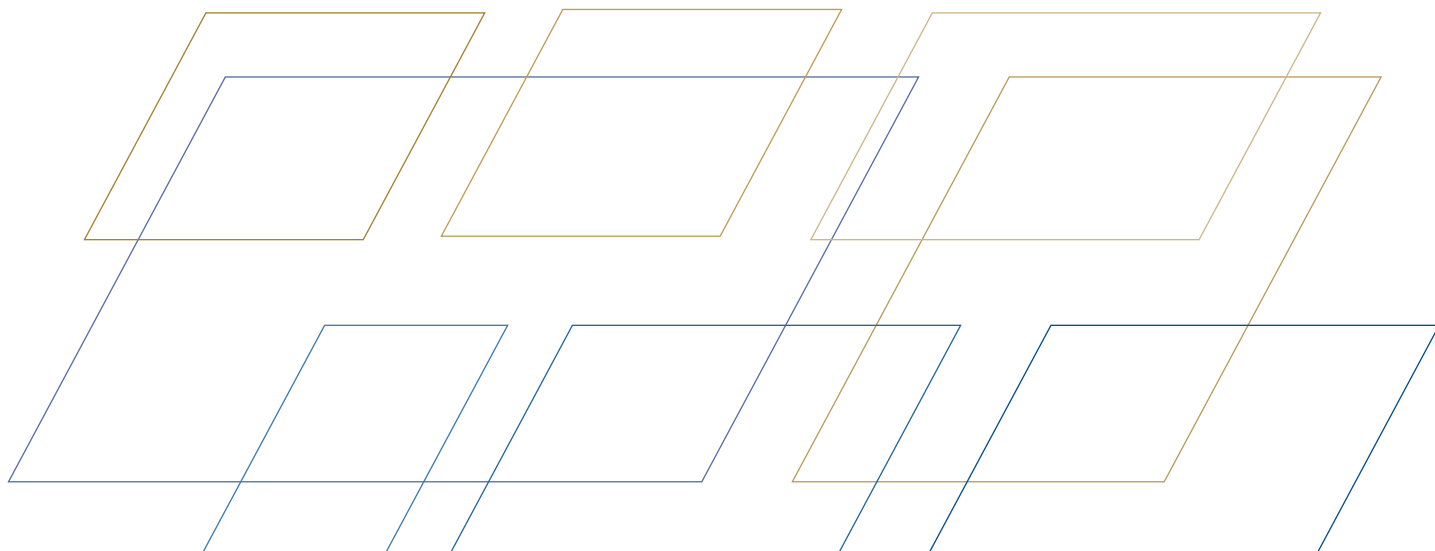
3.6 Communication management

Umalusi's continuous communication with stakeholders has always been useful in sourcing information from stakeholders to meet their needs in relation to its services. Eight communication platforms are used to interact with both internal and external stakeholders: promotional materials, a hotline, bulk emails, radio stations, videos, the website, social networks and newsletters. These platforms have been useful in addressing the following key matters: warning the public about established websites selling fraudulent certificates; providing clarity on standardisation processes; updating on the state of readiness of assessment bodies to administer examinations; educating the public on security features of the certificates issued for the NSC examination; and on certification processes. In addition, public awareness workshops are conducted through the CEO's roadshows, and

through research forums and other advocacy programmes. The Umalusi communication strategy guides the use of all these platforms.

During the national lockdown the organisation was unable to conduct exhibitions and CEO roadshows. However, webinars were used as an alternative, to continue to engage with stakeholders. But because this form of communication is not as effective as physical interaction with stakeholders, the organisation will consider conducting exhibitions as lockdown regulations ease, as well as post-lockdown.

The organisation is resolute in taking a lead in advocacy on issues that affect qualifications within its sub-framework and to avoid contradictory messages and information between Umalusi and the education departments.





PART C

Measuring Our
Performance

1. INSTITUTIONAL PERFORMANCE INFORMATION

Table 3: Number of verifications per financial year (2017–2019)

Programme	Sub-programmes
1. Administration	1.1 Strategy and Governance 1.2 Public Relations and Communications 1.3 Information and Communication Technology 1.4 Human Capital Management 1.5 Finance and Supply Chain Management
2. Qualifications and Research	2.1 Qualifications, Curriculum and Certification 2.2 Statistical Information and Research
3. Quality Assurance and Monitoring	3.1 Quality Assurance of Assessment: School Qualifications 3.2 Quality Assurance of Assessment: Post-School Qualifications 3.3 Evaluation and Accreditation

1.1 Administration Programme

The purpose of the Administration Programme is to provide strategic leadership, management and administrative support services to the organisation.

1.1.1 Sub-programmes

The Administration Programme is comprised of the following five sub-programmes:

Sub-Programme 1.1: Strategy and Governance (S&G)

The purpose of the S&G sub-programme is to provide good corporate governance, to support Council, manage the Office of the Chief Executive Officer (OCEO), manage performance information and facilitate the development of the organisational strategy. In addition to the development of the 2022/23 APP and the monitoring of performance through reporting, the focus for the financial year will be on:

- managing performance information risks;
- improving the management of performance information; and
- strengthening corporate governance.

This sub-programme manages all performance information in the organisation. Therefore, having appropriate systems, processes and controls for managing performance adds value to having efficient systems in the organisation.

Sub-Programme 1.2: Public Relations and Communications (PR&COMMS)

The purpose of the PR&COMMS sub-programme is to communicate the organisational mandate, strategy and services to stakeholders. In addition to the normal PR&COMMS services, in this financial year the focus will be on implementing the following:

- conducting a stakeholder satisfaction survey;

- organising a colloquium to profile Umalusi research, in collaboration with the Press Association; and
- adopting an aggressive content generation strategy to keep all stakeholders on these platforms informed about the work of Umalusi. All communication platforms, including digital media platforms, enable the organisation to inform the public about the GFETQSF, which is a legislative mandate.

Conducting a stakeholder satisfaction survey will assist the organisation to identify gaps in the current communication strategy by testing stakeholder perceptions of the organisation's work. This way, each unit will be able to develop appropriate advocacy strategies based on any gaps identified in the survey. Organising a colloquium to profile Umalusi research, in collaboration with the Press Association, is important for the organisation to share its research findings with relevant stakeholders to keep them informed as part of the advocacy initiative.

Sub-Programme 1.3: Information and Communication Technology (ICT)

The purpose of the ICT sub-programme is to manage, support and maintain Umalusi's ICT resources and provide support to business units. In addition to normal ICT services, the ICT focus will be on implementing the following:

- developing Enterprise Resource Planning (ERP) to address MIS challenges and to improve organisational efficiency; and
- sourcing and migrating from on-premises ICT infrastructure to Infrastructure as a Service (IaaS), a cloud solution.

ERP will improve services to Umalusi staff and stakeholders, enhance business reporting and modernise business process standardisation. IaaS will address the current, aging ICT infrastructure. IaaS is the most flexible cloud-computing model

and it provides its clients with instant access to computing, storage and network solutions. It has many benefits for organisations such as Umalusi, including reducing operating costs by spending less on maintenance and software upgrades while improving efficiency.

Sub-Programme 1.4: Human Capital Management (HCM)

The purpose of this sub-programme is to implement HCM governance, attract top talent, cultivate a culture of continuous learning, ensure a transparent performance management system, offer attractive rewards and benefits, and ensure intellectual property is retained in the organisation. In addition to the usual HCM functions, in this financial year the focus will be on implementing the following:

- strengthening HCM governance relating to policies, processes and procedures;
- implementing organisational training and the development plan;
- maintaining the vacancy rate at $\leq 10\%$; and
- implementing an effective performance management and development system (PMDS).

The HCM policies enhance smooth administration by having in place standard procedures for all business units. Attracting appropriate talent, coupled with performance management and development, enhances staff retention, which

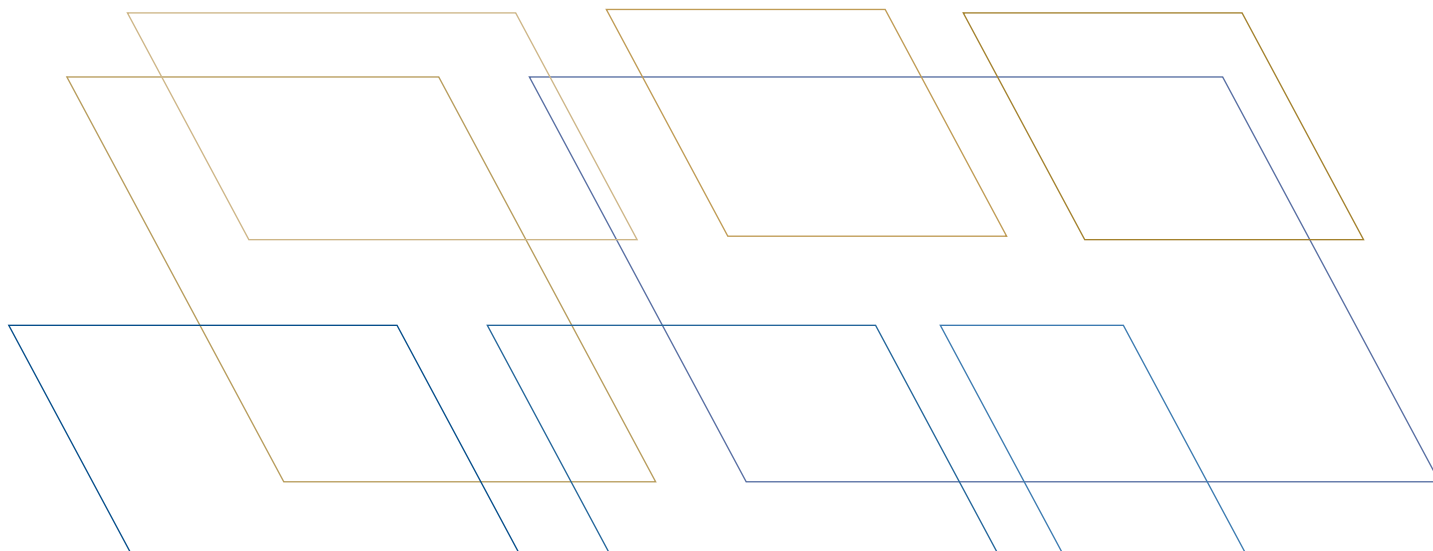
ensures continuous provision of efficient, effective services.

Sub-Programme 1.5: Finance and Supply Chain Management (F&SCM)

The purpose of the F&SCM sub-programme is to ensure transparent, accountable and sound financial management, as well as to maintain a procurement system that is fair, equitable, transparent, competitive and cost-effective. In addition to the standard functions of allocating budgets and managing expenditure, in this financial year the focus will be on implementing the following:

- refurbishing building 41;
- redesigning building 37 to address occupational health and safety non-compliance issues and waterproofing; and
- developing an alternative funding model.

The financial management service supports all other functions of the organisation, its policies, systems and procedures guide all business units in abiding by financial legislation during the process of expending financial resources.



1.1.2 Outcome, Outputs, Performance Indicators and Targets

Outcome	Outputs	Output indicators	Annual targets							
			Audited performance				Estimated performance			
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	
Efficient and effective administrative systems	1.1 Advocacy initiatives	1.1.1: Number of advocacy webinars conducted	-	-	-	4	4	4	4	
	1.2 Achieved ICT network health score	1.2.1: ICT network health score maintained at ≥95%	-	-	-	≥95%	≥95%	≥95%	≥95%	
	1.3 Minimised vacancy rate	1.3.1: Average vacancy rate maintained at ≤10%	-	-	-	≤10%	≤10%	≤10%	≤10%	
	1.4 Paid invoices	1.4.1: Percentage of valid invoices of creditors and suppliers paid within 30 days	99%	99%	97%	99%	99%	100%	100%	

1.1.3 Indicators, Annual and Quarterly Targets

Output indicators	Annual targets			
	Q1	Q2	Q3	Q4
1.1.1: Number of advocacy webinars conducted	1	1	1	1
1.2.1: ICT network health score maintained at ≥95%	≥95%	≥95%	≥95%	≥95%
1.3.1: Average vacancy rate maintained at ≤10%	≤10%	≤10%	≤10%	≤10%
1.4.1: Percentage of valid invoices of creditors and suppliers paid within 30 days	100%	99%	99%	99%

1.2 Qualifications and Research Programme

The purpose of the programme is to develop and manage an efficient and effective GFETQSF within the NQF and to undertake strategic research in support of that goal.

1.2.1 Sub-programmes

The Qualifications and Research programme is comprised of the following two sub-programmes:

Sub-Programme 2.1: Qualifications, Curriculum and Certification (QCC)

The purpose of the QCC sub-programme is to manage the GFETQSF qualifications. In addition to the standard QCC functions of managing qualifications, certification and verification, the focus will be on implementing the following:

- reviewing the GFETQSF and associated policies, e.g. recognition of prior learning (RPL) and credit accumulation and transfer (CAT);
- offering NSC and NATED qualifications in Southern African Development Community (SADC) countries;
- benchmarking the NSC against selected international qualifications;
- developing an online certification system for replacement certificates; and
- the alignment of qualifications to the GFETQSF.

Policies are reviewed to ensure alignment with objectives of the NQF. One of the criteria for the evaluation of qualifications is articulation, which happens through CAT and RPL. It is important to ensure that educational standards across qualifications are maintained.

Umalusi, as a quality council, must ensure that the offering of qualifications on its sub-framework is done in a manner that protects the integrity and credibility of the GFETQSF qualifications. Where intergovernmental agreements are concluded on the offering of the GFETQSF qualifications, Umalusi will determine and monitor the quality assurance of assessment standards to ensure that the qualifications are not compromised.

The benchmarking of the NSC against international qualifications ensures that the NSC is of good international standing. Learners who meet the requirements of the NSC qualification should be able to compete satisfactorily with their international counterparts.

Alignment of qualifications with the GFETQSF ensures that the qualifications are aligned to the criteria set by Umalusi and SAQA for registration of qualifications. This, in turn, ensures articulation with other qualifications on the GFETQSF and qualifications on the other sub-frameworks.

Sub-Programme 2.2.: Statistical Information and Research (SIR)

The purpose of the SIR sub-programme is to provide a platform for research, statistical support and the maintenance of learner databases, to inform the Council's professional work and organisational strategy. In addition to normal SIR functions, the focus will be on implementing the following:

- conducting research on quality assurance of the GETCA, NASCA and GEC;
- appraising intended curricula and assessed curricula (NASCA and GEC);
- articulation of the GEC and qualifications registered on the OQSF (focus on fundamentals); and
- reviewing of mandated quality assurance processes.

The intended research aims to provide evidence-based justification for recommendations to strengthen qualifications, the underpinning curricula and relevant skill development necessary in current and future contexts. The research also intends to enhance standards, to inform articulation across sectors and to provide advice to the Minister on strengthening qualification standards through appropriate and responsive curricula. The research will include critical situational analyses to inform systematic reviews of quality assurance processes and the setting, interpretation and implementation of educational standards. Such analyses would inform the management and fostering of qualifications registered on the GFET sub-sub-framework.

1.2.2 Outcome, Outputs, Performance Indicators and Targets

Outcome	Outputs	Output indicators	Audited performance					Annual targets		
			Estimated performance					MTEF period		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	
Enhanced educational standards	2.1 Reports on management of qualifications	2.1.1: Number of reports produced on the management of qualifications in the sub-framework	3	3	1	1	1	1	4	
	2.2 Printed certificates	2.2.1: Percentage of error-free learner records for which a certificate is printed	99.9%	100%	100%	100%	100%	100%	≥95%	
	2.3 Completed verification requests	2.3.1: Percentage of verification requests received that are completed in terms of the service level agreement: two working days	98%	95%	98%	90%	96%	96%	≤10%	
	2.4 Completed research reports	2.4.1: Number of research reports completed in various formats	10	9	3	4	5	5	100%	

1.2.3 Indicators, Annual and Quarterly Targets

Output indicators	Annual targets			
	Q1	Q2	Q3	Q4
2.1.1: Number of reports produced on the management of qualifications in the sub-framework	-	-	-	1
2.2.1: Percentage of error-free learner records for which a certificate is printed	100%	100%	100%	100%
2.3.1: Percentage of verification requests received that are completed in terms of the service level agreement: two working days	96%	96%	96%	96%
2.4.1: Number of research reports completed in various formats	-	-	-	5

1.3 Quality Assurance and Monitoring Programme

The purpose of this programme is to ensure that the providers of education and training have the capacity to deliver and assess qualifications registered on the GFETQSF and are doing so to the expected standards and quality.

1.3.1 Sub-programmes

The Quality Assurance and Monitoring programme is comprised of the following three sub-programmes:

Sub-Programme 3.1: Quality Assurance of Assessment: School Qualifications (QAA:SQ)

The purpose of this sub-programme is to ensure credibility of assessment and examination results of school qualifications registered on the GFETQSF. In addition to the standard QAA functions for school qualifications, the focus will be on the implementation of the following:

- reconfiguring the quality assurance of SBA;
- ensuring the implementation of automated QAA instruments;
- developing online training material for the monitors; and
- increasing the scope of moderation of non-official language question papers.

The four priorities will enhance the collection of data that will be used to develop the QAA reports. The reports, which articulate the standards envisaged in education, provide feedback to the assessment bodies and the institutions. These contribute to the enhancement of educational standards.

Sub-Programme 3.2: Quality Assurance of Assessment: Post-School Qualifications (QAA:PSQ)

The purpose of this sub-programme is to ensure credibility of assessment and examination results of post-school qualifications registered on the GFETQSF. In addition to the standard QAA functions for post-school qualifications, the focus will be on the implementation of the following:

- strengthening internal assessment moderation and feedback methods to improve teaching, learning and assessment practices;
- increasing the external moderation and monitoring of ISAT, PAT and oral assessments across the post-school qualifications;
- intensifying the moderators' skills and expertise through face-to-face and online training approaches;

- ensuring the implementation of automated QAA instruments for better quality reporting during the standardisation and approval of results processes; and
- supporting and monitoring the implementation of QAA policies for improved compliance by assessment bodies.

These priorities will enhance moderation feedback to assessment bodies and improve the implementation of internal assessment and subsequent student performance. The use of innovative strategies of automated instruments and reports will result in a shift from compliance monitoring of outputs to timely and quality reporting towards the realisation of educational outcomes of enhanced educational standards.

Sub-Programme 3.3: Evaluation and Accreditation (E&A)

The purpose of this sub-programme is to quality assure the delivery of qualifications registered on the GFETQSF at private education institutions and the capacity of private assessment bodies to assess those qualifications. In addition to the standard E&A functions, the focus will be on the implementation of the following:

- conducting virtual site visits;
- conducting virtual Quality Promotion Meetings;
- conducting virtual Accreditation Forums to interact with all stakeholders on matters relating to accreditation;
- implementing the process of non-certification of learners who sit for the NSC examination at non-accredited independent schools, in line with paragraph 26A of Government Gazette No. 31337 of 29 August 2008, as amended, which requires that independent schools be accredited by Umalusi to be registered as an examination centre; and
- implementing the process of non-certification of learners who sit for the National Education (NATED) Report (190/191) N1-N3 Engineering Studies and NC(V) examinations at non-accredited private colleges.

The credibility of Umalusi's qualifications depends on several quality assurance processes. Without these processes, so many things can go wrong in terms of how institutions offer the qualifications on the GFETQSF and this may compromise the integrity of the general and further education system in the country.

1.3.2 Outcome, Outputs, Performance Indicators and Targets

Outcome	Outputs	Output indicators	Annual targets								
			Audited performance				Estimated performance			MTEF period	
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24		
Enhanced educational standards	3.1 Published quality assurance of assessment reports	3.1.1: Number of quality assurance of assessment reports published for qualifications registered on the GFETQSF	NSC 6 SC 1 GETC 6 NATED 2 NATED/ NC(V) 1	10	10	10	8	10	10	10	
	3.2 Approved question papers	3.2.1: Percentage of question papers approved per qualification	NSC: 100% SC (a): 100% GETC: 100% NC(V): 100% NATED: 132%	100%	100%	100%	100%	100%	100%	100%	
	3.2 Approved question papers	3.3.1: Number of assessment bodies audited for their state of readiness to conduct examinations	-	14	13	12	4	4	4	4	
	3.4 Verified marking	3.4.1: Number of subjects for which verification of marking is conducted	-	95	90	70	88	90	92		
	3.5 Moderated internal assessment	3.5.1: Number of subjects for which moderation of internal assessment is conducted	-	145	208	85	125	125	125	125	
	3.6 Accreditation outcomes for private education institutions	3.6.1: Percentage of accreditation outcomes for private education institutions finalised within 12 months of the site visit	-	88%	89%	82%	85%	85%	85%	85%	
	3.7 Monitored private education institutions	3.7.1: Percentage of identified private education institutions monitored after being granted accreditation	10	97%	95.7%	70%	90%	90%	90%	90%	

1.3.3 Indicators, Annual and Quarterly Targets

Output indicators	Annual targets	Q1	Q2	Q3	Q4
3.1.1: Number of quality assurance of assessment reports published for qualifications registered on the GFETQSF	10	-	2	1	7
3.2.1: Percentage of question papers approved per qualification	100%	-	-	-	100%
3.3.1: Number of assessment bodies audited for their state of readiness to conduct examinations	4	-	-	4	-
3.4.1: Number of subjects for which verification of marking is conducted	88	-	-	-	88
3.5.1: Number of subjects for which moderation of internal assessment is conducted	125	-	-	-	125
3.6.1: Percentage of accreditation outcomes for private education institutions finalised within 12 months of the site visit	85%	-	-	-	85%
3.7.1: Percentage of identified private education institutions monitored after being granted accreditation	90%	-	-	-	90%



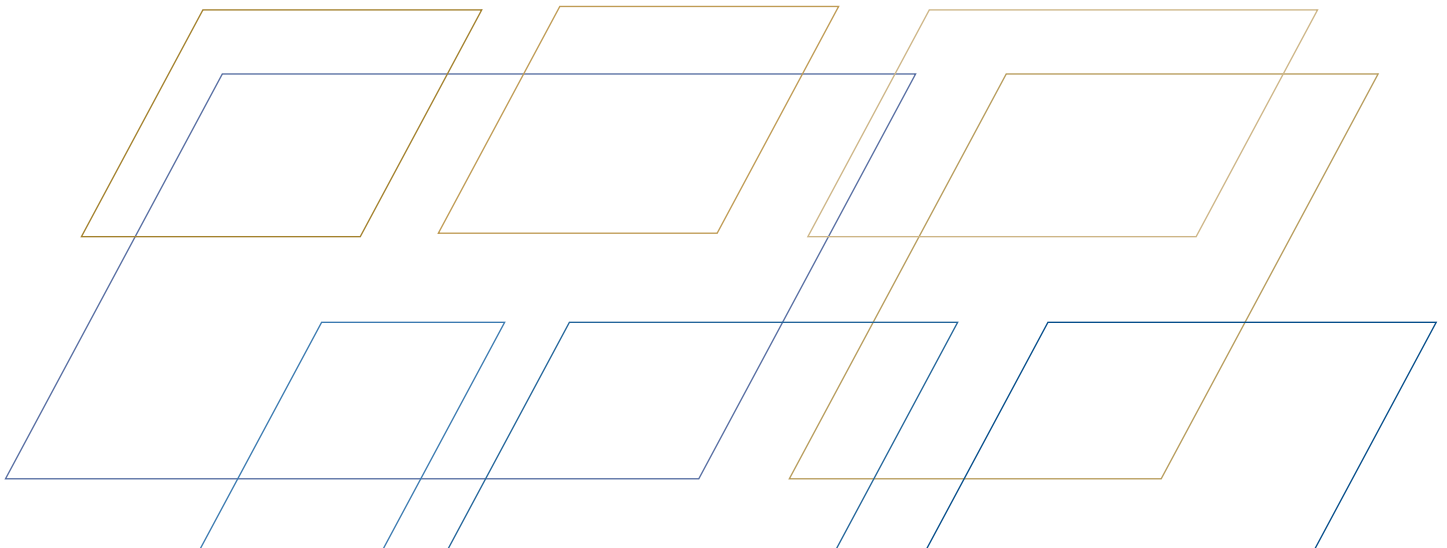
2. EXPLANATION OF PLANNED PERFORMANCE OVER THE MEDIUM TERM PERIOD

2.1 Efficient and effective administrative systems

The Administration Programme's outputs will be implemented to ensure the achievement of the outcome. All the Administration sub-programmes will play a role in achieving this outcome. Each sub-programme will implement key functions for the 2021/22 financial year. Some of the measures include review and development of policies, systems and procedures that guide organisational administration.

2.2 Enhanced quality of educational standards

The Qualifications and Research programme, together with Quality Assurance and Monitoring programme outputs, will be implemented to ensure the achievement of the outcome. Each sub-programme of the two programmes will implement key functions that are intended to contribute towards the achievement of the outcome during the financial year. Research will be intensified to inform decision-making in relation to the qualifications registered on the sub-framework. Umalusi will also play a leading role in advising the Ministers of Education on new developments in the education system.



3. PROGRAMME RESOURCE CONSIDERATIONS

3.1 Overview: Budget and MTEF estimates

3.1.1 Administration

	Audited outcomes				Adjusted appropriation	Revised budget estimates		
	2017/18	2018/19	2019/20	2020/21		2021/22	2022/23	2023/24
Rand thousand								
Compensation of employees	28 063	31 147	38 606	36 165	37 973	39 872	41 666	
Goods and services	32 797	37 233	30 625	26 589	27 163	31 490	32 907	
Total expenditure	60 860	68 380	69 231	62 754	65 136	71 362	74 573	

3.1.2 Qualifications and Research

	Audited outcomes				Adjusted appropriation	Revised budget estimates		
	2017/18	2018/19	2019/20	2020/21		2021/22	2022/23	2023/24
Rand thousand								
Compensation of employees	15 719	17 336	18 031	20 382	21 401	22 471	23 482	
Goods and services	8 653	11 277	6 633	11 632	11 924	12 221	12 771	
Total Expenditure	24 372	28 613	24 664	32 014	33 325	34 692	36 253	

3.1.3 Quality Assurance and Monitoring

	Audited outcomes				Adjusted appropriation	Revised budget estimates		
	2017/18	2018/19	2019/20	2020/21		2021/22	2022/23	2023/24
Rand thousand								
Compensation of employees	23 833	25 135	27 602	28 438	29 860	31 353	32 764	
Goods and services	52 504	57 960	54 474	43 181	46 702	47 939	50 096	
Total Expenditure	76 337	83 095	82 076	71 619	76 562	79 292	82 860	

3.2 Explanation of resources' contribution to achieving the outputs

Umalusi intends to play a leading role in researching educational development and innovation in the sector. Research supports the outcome of credible qualifications and improvement in the quality of the curricula.

In view of the DBE's piloting of the GEC qualification, Umalusi will evaluate the curriculum offerings before this new qualification is registered with SAQA. The organisation will continue to evaluate the curricula of qualifications in the sub-framework. In addition, Umalusi will print certificates for completed qualifications and verify qualifications for interested parties.

The main cost-driver of quality assurance of assessment is the payment to independent contractors who carry out these functions. The national lockdown has resulted in a budget reprioritisation in the MTEF period. The originally approved budget of R199-million was reduced, due to an expected decline in sources of revenue from certification, verification and accreditation: certification revenue is expected to decrease by R 2.5-million, while revenue from verification and accreditation is expected to decline by R1.5-million and R 2.8-million respectively, due to the impact of COVID-19. The expected decline in revenue will result from a decrease in the expected number of site visits and provisional accreditations to be conducted and an expected decline in demand for verification of qualifications in the current COVID-19 environment. The DBE and National Treasury have reduced the annual allocation by R 8.3-million in this financial year and by R 21.1-million in the 2022/23 financial year. In this MTEF period, Umalusi will also quality assure two new qualifications, the NASCA and the GETCA. Additionally, with the developments regarding the GEC, the entity's funds will have to be used for quality assurance of assessment of this qualification. The DBE and National Treasury will be petitioned to allocate additional funds for the new mandates that would otherwise increase the scope of Umalusi with no concomitant increase in funding.

The decline in revenue has also necessitated a reprioritisation of expenditure to cater for additional ICT infrastructure, to enable Umalusi staff to work from home in the COVID-19 environment. Travel, catering and accommodation costs have been reduced by R7-million, while the cost of consulting services for external moderation, verification of marking and honoraria for examiners has been reduced by R12-million to cater for a new way of conducting quality assurance processes.

3.3 Materiality and Significance

3.3.1 Materiality

The Council has considered the following factors in determining Umalusi's level of materiality:

- a) the nature of Umalusi's business;
- b) statutory requirements affecting Umalusi;
- c) the inherent and controlled risks associated with Umalusi; and
- d) quantitative and qualitative issues.

Having taken these factors into account, the Council has assessed the level of "a material loss" to be:

- a) every amount in respect of criminal conduct;
- b) R30 000 and above for irregular, fruitless and wasteful expenditure involving gross negligence; and
- c) R1 566 447¹ and above, being about 1% of revenue, to report in terms of subsection 55 (1) (d) regarding the fair presentation of the affairs of the public entity, its business, its financial results, its performance against predetermined objectives and its financial position, as at the end of the financial year concerned.

3.3.2 Significance

The Council has decided that any transaction covered by section 54(2) of the Public Finance Management Act (PFMA) will be reported on, being:

- a) establishment or participation in the establishment of a company - each transaction separately;
- b) participation in a significant partnership, trust, unincorporated joint venture or similar arrangement - 50% of voting rights;
- c) acquisition or disposal of a significant shareholding in a company - 30% or more of shareholding;
- d) acquisition or disposal of a significant asset - 1% of fixed assets;
- e) commencement or cessation of a significant business activity - each transaction separately; and
- f) a significant change in the nature or extent of its interest in a significant partnership, trust, unincorporated joint venture or similar.

¹ Based on the audited figure of revenue for 2019/20

4. KEY RISKS

Outcome	Key risk(s)	Risk mitigation
Efficient and effective administrative systems	a. Unreliable MIS data	<ul style="list-style-type: none"> Phase out MIS and replace it with enterprise resource planning (ERP) solution
	b. High staff turnover rate/ human resource constraints	<ul style="list-style-type: none"> Combination of appointment of short-term contractors Job evaluation Benchmarking and work-study investigation Restructure the business units
	c. Lack of alternative funding model	<ul style="list-style-type: none"> Full cost recovery from private education institutions
Enhanced educational standards	a. Limited budget to carry out ad hoc activities	<ul style="list-style-type: none"> Ring-fence the budget Put systems in place to minimise debt and maximise revenue
	b. Reliance on independent contractors for execution and reporting on processes may compromise the confidentiality of organisational information	<ul style="list-style-type: none"> The contracts with independent contractors must clearly detail issues of confidentiality and consequences for lack of confidentiality Deploy staff to conduct quality assurance processes Deploy staff to monitor the contract staff when conducting quality assurance processes Conceptualise research projects done internally
	c. Non-availability of independent contractors to perform the duties when needed	<ul style="list-style-type: none"> Increase the pool of independent contractors
	d. Institutions offering qualifications without being accredited	<ul style="list-style-type: none"> Work closely with the relevant departments to ensure that private education institutions offering qualifications registered on the GFETQSF are accredited
	e. Examination irregularities	<ul style="list-style-type: none"> Strengthen the state of readiness verification processes to identify centres with potential risk for committing irregularities Centres classified as high risk will be sampled for monitoring
	f. The use of the same consultants to conduct research may result in biased research outcomes/ findings	<ul style="list-style-type: none"> Increase and diversify the pool of independent contractors
	g. The use of e-standardisation portal may compromise the confidentiality of information (e.g. marks) and the standardisation process	<ul style="list-style-type: none"> Increase and diversify the pool of independent contractors

5. PUBLIC ENTITIES

None.

6. INFRASTRUCTURE PROJECTS

Umalusi does not have large infrastructure projects to address under this section.

7. PUBLIC PRIVATE PARTNERSHIPS

None.



PART D

Technical Indicator
Descriptions (TID)

Indicator title	1.1.1: Number of advocacy webinars conducted
Definition	The indicator measures Umalusi's use of webinars to interact with stakeholders and communicate information about the GFETQSF. The webinars are intended to communicate key messages to stakeholders about the organisation's mandate, functions and services. They will also be used to update stakeholders on new developments in the sub-framework.
Source of data	Organisational programmes, information documents, standard operation procedures/guidelines, policies and SLAs.
Method of calculation	Simple count.
Means of verification	Recordings of webinars and reports.
Assumptions	The advocacy webinars will positively influence stakeholders' perceptions about the organisation and be of benefit to stakeholders.
Calculation type	Cumulative
Reporting cycle	Quarterly
Desired performance	To ensure continuous engagement with stakeholders
Indicator responsibility	Senior Manager: PR&COMMS

Indicator title	1.2.1: ICT network health score maintained ≥95%
Definition	The indicator measures the organisational ICT network health score as determined by the Kaseya IT Management Software and Monitoring Solution. Predetermined scores in the following areas: server uptime, alarm score, disk score and operating systems score, calculate the network health score percentage. This is to ensure that the health score does not drop to an unacceptable level. Maintaining the ICT network health score at 95% and above will ensure the smooth running of ICT operations and security of information.
Source of data	IT management software and monitoring solution.
Method of calculation	Total scores for: server uptime, alarm score, disk score and operating systems divided by 4. <i>i.e. $\frac{\text{server uptime score} + \text{alarm score} + \text{disk score} + \text{operating systems score}}{4}$</i>
Means of verification	ICT network health report.
Assumptions	None.
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	To maintain the ICT health network score at an acceptable level for smooth ICT operations and security of information
Indicator responsibility	Senior Manager: ICT

Indicator title	1.3.1: Average vacancy rate maintained at ≤10%
Definition	The indicator measures the minimising of the organisational vacancy rate to the acceptable rate, to ensure that mandates are effectively carried out.
Source of data	Staff establishment records or system.
Method of calculation	Quarterly calculation: $\frac{\text{Number of vacant positions on the organisational structure}}{\text{Number of all approved (funded) positions on organisational structure}} \times 100$ Annual calculation: Add the four reported quarterly outputs and divide by four.
Means of verification	Quarterly reports on staff establishment .
Assumptions	Vacated positions are filled within three months .
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Maintain organisational vacancy rate at 10% or lower annually
Indicator responsibility	Senior Manager: HCM

Indicator title	1.4.1: Percentage of valid invoices of creditors and suppliers paid within 30 working days
Definition	This indicator measures the number of valid invoices paid within 30 days, as per National Treasury guidelines. Valid invoices are submitted by creditors and suppliers who rendered/supplied goods and services (e.g. stationery, printing and repairs) to Umalusi. The 30 days will be calculated from the date of receipt of a valid invoice after goods and services have been accepted. Any invoice with a valid query* must be resolved before payment is made. Such invoices will be excluded from the population. After the query has been resolved, the 30-day period will be implemented. *Valid query communicated to the service provider.
Source of data	PASTEL system.
Method of calculation	Number of valid invoices paid within 30 days in the quarter under review, divided by the number of invoices received by the F&SCM Unit during the quarter x100.
Means of verification	Register indicating all received and paid invoices of creditors and suppliers from the F&SCM Unit.
Assumptions	All valid invoices are paid within the turnaround time.
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Umalusi aims to pay 99% of invoices received from creditors and suppliers within 30 working days of receipt
Indicator responsibility	Senior Manager: F&SCM

Indicator title	2.1.1: Number of reports produced on the management of qualifications in the sub-framework
Definition	This indicator measures the number of reports developed for activities/developments on the management of qualifications in the GFETQSF. The reports cover the following aspects in the QCC spectrum: developments/activities related to the evaluation of new qualifications and the review of existing qualifications; appraisal of the curricula of the qualifications on the GFETQSF; all research undertaken on matters related to the management of qualifications on the GFETQSF; policy-related matters; the implementation of new qualifications; advocacy related to the GFETQSF; certificates issued; and verifications done for the registered qualifications.
Source of data	Qualifications, curriculum, certifications and research: progress reports.
Method of calculation	Count of reports produced on the management of qualifications.
Means of verification	Reports on the management of qualifications in the GFETQSF.
Assumptions	Information concerning the management of qualifications is valid and aligned to the financial year of reporting.
Calculation type	Non-cumulative.
Reporting cycle	Annual
Desired performance	Development of reports reflecting the extent of the GFETQSF management initiatives
Indicator responsibility	Senior Manager: QCC

Indicator title	2.2.1: Percentage of error-free learner records for which a certificate is printed
Definition	Percentage of certificates issued to learners who compiled with the requirements for a qualification, as requested by their assessment body. The mainframe system is used to source the information for the indicators. The mainframe system contains the following types of records: candidate records received for certification; rejected; withdrawals; passed; failed; and certificates printed. The indicator focuses only on records that are eligible for certification.
Source of data	Mainframe.
Method of calculation	Number of certificates printed divided by number of learners who have passed one or more subjects and are eligible for a certificate x100.
Means of verification	Spreadsheet system-generated report.
Assumptions	The data stored in the mainframe system is reliable and valid.
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	To print certificates for all who qualify for a certificate
Indicator responsibility	Senior Manager: QCC

Indicator title	2.3.1: Percentage of verification requests received that are completed in terms of the service level agreement (SLA): two working days
Definition	Umalusi provides a service to contracted clients who submit requests for the verification of certificates that have been issued by Umalusi and by its predecessor, SAFCERT, since 1992. Clients submit requests in one of three formats (manual, electronic and full verifications) and Umalusi confirms the authenticity of the data submitted by the client, or indicates it is not able to do so. The indicator refers to the percentage of requests for verification of qualifications completed within the established turnaround time. Umalusi receives verification requests from contracted clients and verifies these. Verification feedback is given to contracted clients within two working days via email.
Source of data	Email server.
Method of calculation	Number of verification requests completed within the SLA (two working days) divided by the total number of verification requests received x 100.
Means of verification	An Excel report from the email server indicating number of requests received for verification of qualifications; and verifications completed within two working days.
Assumptions	The data stored in the mainframe system is reliable and valid.
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	To have verification requests processed within two working days
Indicator responsibility	Senior Manager: QCC

Indicator title	2.4.1: Number of research reports completed in various formats
Definition	This indicator shows the number of reports on research findings, investigations or strategic internal or external support, completed and published as printed reports, papers or digital-only reports, by the SIR Unit within the specified financial year. The purpose of these research reports is to ensure the organisation is informed of new developments concerning qualifications in the sub-framework.
Source of data	Findings from an instrument application.
Method of calculation	Count of completed reports in various formats.
Means of verification	Research reports.
Assumptions	Completed research informs the Council's decision-making on mandates.
Data limitations	None
Type of indicator	Output
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	Completion of research reports and making recommendations to the relevant bodies
Indicator responsibility	Senior Manager: SIR

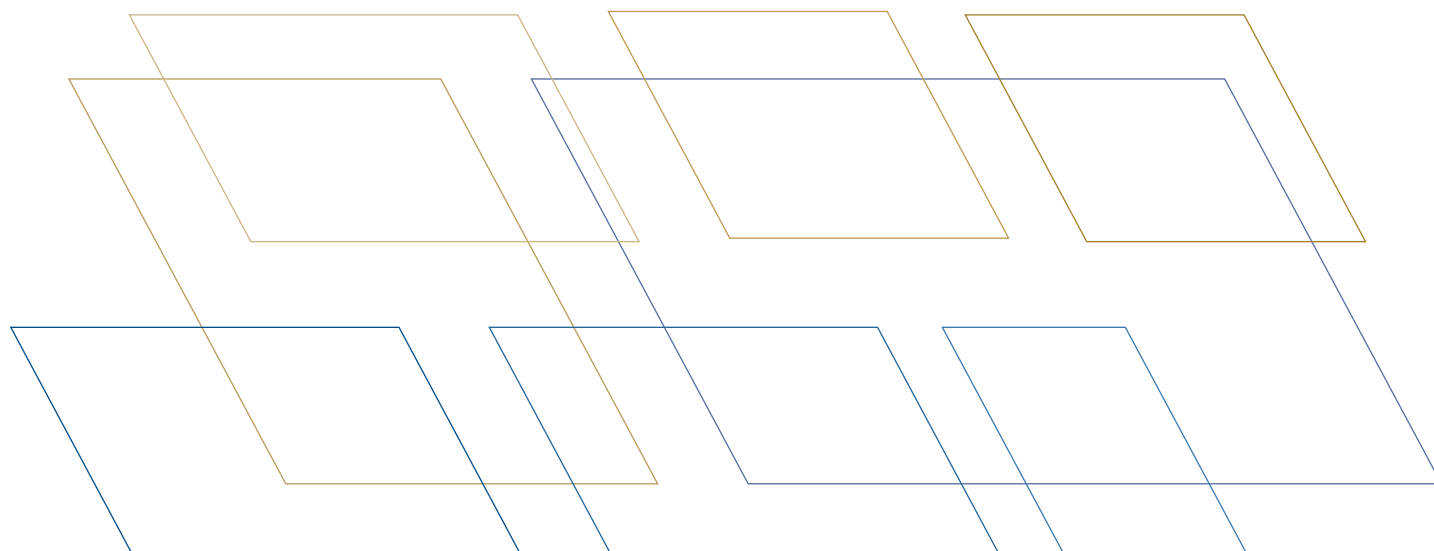
Indicator title	3.1.1: Number of QAA reports published for qualifications registered on the GFETQSF
Definition	The indicator aims to measure the number of reports published on the compliance of assessment bodies with Umalusi policies, across all quality assurance processes. Published means the reports will be placed on the Umalusi website and will have an International Standard Book Number (ISBN). Assessment bodies are entities accredited by Umalusi, or deemed accredited, to conduct external summative assessment of, and to moderate, internal assessment for qualifications registered on the GFETQSF. Qualification refers to a national qualification registered on the GFETQSF. Quality assurance processes include moderation of question papers, monitoring of the state of readiness to manage, administer and conduct the examination, moderation of internal assessment and verification of marking. NATED is included.
Source of data	Quality assurance reports
Method of calculation	Count of reports published
Means of verification	Quality assurance reports
Assumptions	Timeous submission of monitoring and moderation reports by independent contractors.
Calculation type	Cumulative
Reporting cycle	Quarterly
Desired performance	To publish eight QAA reports to provide feedback to assessment bodies and institutions about the quality assurance processes, so that they may improve
Indicator responsibility	Senior Manager: QAA: SQ; and Senior Manager: QAA: PSQ

Indicator title	3.2.1: Percentage of question papers approved per qualification
Definition	The indicator measures the percentage of question papers submitted to Umalusi by assessment bodies for external moderation and approval. Assessment bodies are entities accredited by Umalusi, or deemed accredited, to conduct external summative assessment and to moderate internal assessment for qualifications registered on the GFETQSF. Approved means final acceptance by the external moderator of the quality and standard of the question paper and is indicated on the report by signature of the external moderator.
Source of data	External moderator reports for moderation of question papers.
Method of calculation	Number of question papers approved divided by number of question papers received for quality assurance x 100.
Means of verification	Reports on the moderation of question papers/declaration reports. List of approved question papers.
Assumptions	The external moderators responsible for moderation of question papers are competent to make the correct judgements on the standard of the question papers. The assessment bodies will effect required changes timeously.
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	Umalusi will externally moderate and approve 100% of question papers received from assessment bodies
Indicator responsibility	Senior Manager: QAA: SQ; and Senior Manager: QAA: PSQ

Indicator title	3.3.1: Number of assessment bodies audited for their state of readiness to conduct examinations
Definition	In this indicator the number of assessment bodies refers to entities accredited by Umalusi, or deemed accredited, to conduct external summative assessments and to moderate internal assessments for qualifications registered on the GFETQSF. Auditing of state of readiness refers to an evaluation of the assessment bodies' processes for Umalusi to pronounce on their readiness to conduct, administer and manage external examinations for qualifications registered on the GFETQSF.
Source of data	State of readiness reports
Method of calculation	Count of audited assessment bodies
Means of verification	Consolidated state of readiness reports List of audited assessment bodies
Assumptions	Number of assessment bodies remains constant.
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	To audit all assessment bodies on their state of readiness to conduct examinations
Indicator responsibility	Senior Manager: QAA: SQ

Indicator title	3.4.1: Number of subjects for which verification of marking is conducted
Definition	In this indicator the number of subjects refers to those subjects included in the verification of marking sample (as per the QAA plans). Verification is the process of measuring the compliance of an assessment body with policy/regulations for marking. Assessment bodies are entities accredited by Umalusi, or deemed accredited, to conduct and moderate internal assessment for qualifications registered on the GFETQSF. The indicator intends to make a judgement on the quality of marking to ensure the credibility of the examination result.
Source of data	External moderator reports on verification of marking.
Method of calculation	Count of subjects for which verification of marking was conducted.
Means of verification	Verification of marking reports. List of subjects for which verification of marking was conducted.
Assumptions	Timely submission of verification of marking reports by independent contractors.
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	Verification of marking is conducted in the selected sample of subjects
Indicator responsibility	Senior Manager: QAA: SQ

Indicator title	3.5.1: Number of subjects for which moderation of internal assessment is conducted
Definition	<p>The number of subjects refers to subjects in the case of the NC(V); learning areas in the case of the GETC: ABET Level 4; and instructional offerings, in the case of the NATED Report 190/191, which are sampled for moderation of internal assessment. Moderation measures the assessment bodies' compliance with internal assessment requirements.</p> <p>Internal assessment refers to SBA for the GETC: ABET; and ICASS for the NC(V) and NATED Report 190/191.</p> <p>SBA and ICASS are assessments set at national or site level, and conducted and assessed at the sites of learning. Assessment bodies are entities accredited by Umalusi, or deemed accredited, to conduct and moderate internal assessment for qualifications registered on the GFETQSF.</p>
Source of data	External moderator reports on the moderation of internal assessment.
Method of calculation	Count of subjects moderated.
Means of verification	External moderator reports. List of subjects moderated for internal assessment.
Assumptions	Timely submission of moderation of internal assessment reports by independent contractors.
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	Internal assessment to be moderated and reported
Indicator responsibility	Senior Manager: QAA: PSQ



Indicator title	3.6.1: Percentage of accreditation outcomes for private education institutions finalised within 12 months of the site visit
Definition	<p>This indicator measures the percentage of accreditation reports presented to the Accreditation Committee of Council (ACC) and the outcomes, signed by the CEO of Umalusi; or, in the case of a window period granted to improve, signed by the Senior Manager: E&A, within 12 months of the date of the site visit. The 12-month period may include site visits conducted in the previous financial year. However, as long as the report is presented to the ACC in the current financial year and is not deferred to the ACC meeting in the next financial year, the institution will be counted</p> <p>An accreditation outcome refers to the recommendation of the ACC on the outcome of an application for accreditation from a private education institution. The outcome is presented to the CEO of Umalusi for a decision of "accreditation", "provisional accreditation" or "no accreditation", or the recommendation of a window period granted to the private education institution by the ACC and confirmed by the Senior Manager: E&A.</p> <p>A site visit is the process whereby teams of evaluators and subject specialists visit an institution to verify the implementation of evidence provided by the institution in their self-evaluation report. The private education institution must make payment prior to a site visit being conducted</p> <p>"Private education institutions" refers to independent schools, private FET colleges and private AET centres that offer qualifications registered on the GFETQSF</p> <p>"finalised" means that the accreditation outcome has been signed by the CEO or SM</p>
Source of data	Management information system and online accreditation system
Method of calculation	<p><i>Total number of accreditation reports served at the ACC in a financial year and the outcomes, signed by the CEO/SM, and finalised within 12 months of the site visit divided by the total number of reports presented to the ACC in a financial year x 100.</i></p> <p><i>N.B. reports that are presented to the ACC and then deferred or referred back to the ACC for a decision review, which meeting falls into the next financial year, will be counted in the statistics of the meeting in the financial year in which the final accepted recommendation is made. In addition, reports submitted to the ACC in a financial year but not yet finalised (i.e. not signed by the CEO/SM) and which are still within 12 months of the site visit, will be excluded from the denominator in the financial year in which they were served at the ACC, and included in the statistics for the following financial year.</i></p> <p><i>Improvement reports submitted to the ACC that did not necessitate a site visit will be excluded from the calculation.</i></p>
Means of verification	<p>Electronic spreadsheet report highlighting dates of site visits conducted, names of institutions and dates presented to the ACC</p> <p>Letters to institutions advising of the outcome of accreditation applications</p> <p>Minutes of ACC meetings</p> <p>Signed tracking forms</p>
Assumptions	Finalisation of reports may span different financial years, with the site visit conducted in one financial year and the outcome finalised in the next. (The 12-month period after a site visit may fall in a subsequent financial year). Reports presented to the ACC may be deferred by the ACC or referred back to the ACC, with the meetings spanning consecutive financial years. Reports presented to the final ACC meeting of a financial year might be finalised only in the following financial year, although the report may still be within the 12-month period of the date of the site visit
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	To finalise accreditation outcomes within 12 months of a site visit to a private education institution
Indicator responsibility	Senior Manager: E&A

Indicator title	3.7.1: Percentage of identified private education institutions monitored after being granted accreditation
Definition	<p>This indicator measures the percentage of institutions monitored after being granted accreditation. Monitoring ensures compliance with the minimum requirements for accreditation. Each accredited institution must be monitored at least once every two years, not more than three months later than the biennial date of its accreditation.</p> <p>Identified means a private education institution which is in the biennial period of its accreditation. It excludes those that undergo "extension of scope" in that year, as well as private colleges in their 6th year of accreditation.</p> <p>Monitoring refers to a process of checking to ascertain if accredited private education institutions continue to maintain the minimum standards required for accreditation, which begins with either receipt of a monitoring report or conduct of a monitoring site visit.</p> <p>Accreditation means the outcome of a quality assurance process of evaluating and determining whether a private education institution has the capacity to offer a qualification or programmes leading to a qualification on the GFETQSF.</p>
Source of data	<p>Reports and evidence from private education institutions</p> <p>Records of accreditation decisions made by the ACC</p> <p>Evidence of date of receipt of a monitoring report or, in the absence of a submitted report, evidence of conducting a site visit.</p>
Method of calculation	<p><i>Total number of identified institutions which have been monitored within the two year period of their accreditation and not more than three months later than the biennial anniversary of their accreditation divided by the total number of identified accredited institutions falling within the financial year that are required to be monitored x 100.</i></p> <p><i>i.e. Numerator: No. of identified institutions monitored within the required period</i></p> <p><i>Denominator: No. of identified institutions falling within the financial year that are required to be monitored x 100=Achievement</i></p>
Means of verification	<p>Spreadsheet outlining the following:</p> <p>Due date for monitoring</p> <p>Date of monitoring (i.e. date of receipt of monitoring report or of conducting a site visit)</p>
Assumptions	Private education institutions continue to operate in line with their original registration at the time of the required monitoring
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	To monitor identified accredited institutions
Indicator responsibility	Senior Manager: E&A



ANNEXURE A

Revision of the Strategic
Plan 2020-2024

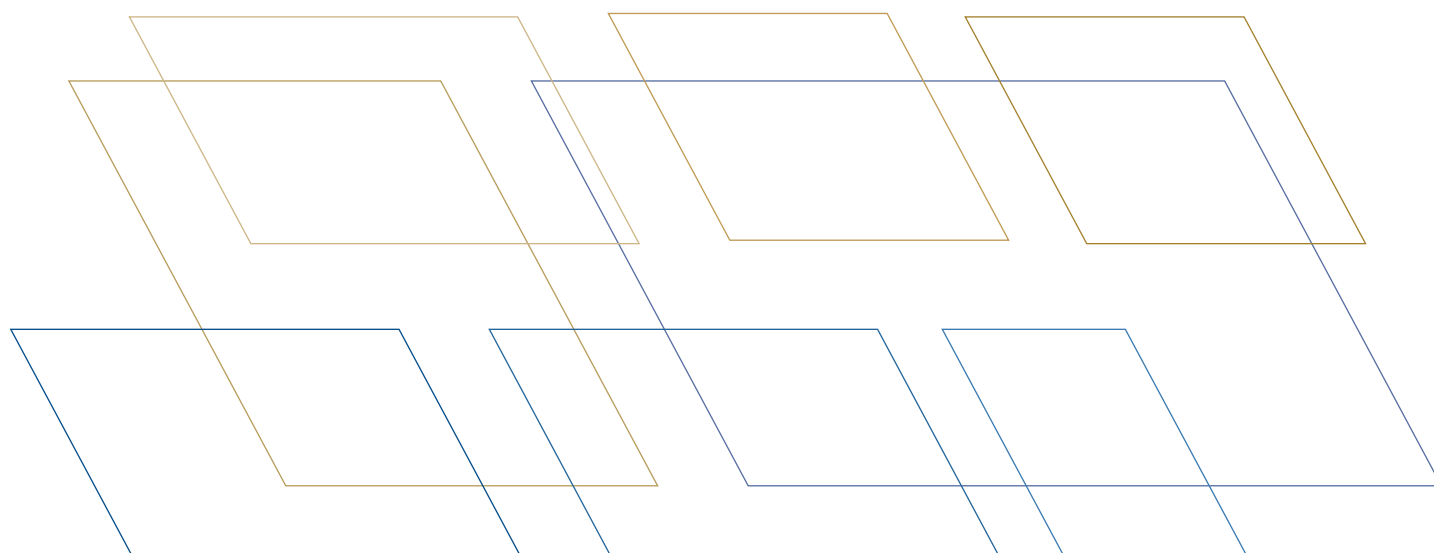
This annexure is intended to reflect the review of Umalusi's Strategic Plan 2020-2024. The revision is the adjustment to the number of priorities to which Umalusi is required to respond, as per the approved MTSF 2019-2024.

Initial MTSF priority number

MTSF priority			
Priority 2: Education, skills and health			
Outcome	Outcome indicator	Baseline	Five-year target
1. Efficient and effective administrative systems	1.1 Improved audit outcomes	Unqualified audit opinions	Unqualified audit opinions with no material findings
2. Enhanced educational standards	2.1 Percentage compliance to prescribed requirements to deliver and assess qualifications in the GFETQSF	-	95%

Published MTSF priority number

MTSF priority			
Priority 3: Education, skills and health			
Outcome	Outcome indicator	Baseline	Five-year target
1. Efficient and effective administrative systems	1.1 Improved audit outcomes	Unqualified audit opinions	Unqualified audit opinions with no material findings
2. Enhanced educational standards	2.1 Percentage compliance to prescribed requirements to deliver and assess qualifications in the GFETQSF	-	95%





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