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Investigating the Funding of Teacher Education and Teacher Employment Prospects in the Face of National Student Financial Aid Scheme (NSFAS) and Fundza Lushaka Bursary Scheme in South Africa

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Abstract:

The funding of education in South Africa, particularly post-secondary education, has proved to be a difficult and highly contentious issue. The funding challenges in this sphere sit high in the agendas of organizations such as Section 27 (though one of its priority areas is basic education), and at the very extreme and radical end, the 'fees must fall campaign.' These organizations emerged through the provisions of section 29 of the Constitution of South Africa, section 29 1(b), which obliges the state to provide further education through reasonable measures and make the same progressively available and accessible. This paper argues for clarity on the binary funding models, specifically for teacher education and the concomitant discrimination that emerges when those who were funded through the Fundza Lushaka bursary scheme are preferred for employment while their NSFAS counterparts are not. The central argument is that both models source their funds from the national treasury, but one is more preferred than the other. Secondly, a question arises as to why we have two funding models for the same purpose instead of channelling the funds through one model and ensuring that, in the end, all the beneficiaries stand the same chances of employment. This paper, therefore, hypothesizes that the government deliberately discriminates against some of the recipients of educational support, given that the two models have different qualification criteria for funding.

Keywords: Fundza Lushaka Bursary Scheme, National Students Financial Aid Scheme (NSFAS), section 27, educational funding models, post-secondary education, funding qualification criteria, teacher education

1. Introduction

Since the dawn of democracy in 1994, the education system of South Africa has undergone several major changes. These changes, which I will highlight in the cause of this paper, were informed by the transformation agenda of the African National Congress (ANC), which took over the government from the National Party. The ANC placed education at the top of its transformation agenda, informed by the assumption that education has to be the driver of all transformation initiatives of its government. This view is supported by Duvenhage (2006:125), who argued that according to the ANC government, education had to play a key role in the transformation of the South African communities. This view was encapsulated in the 1995 White Paper for Education and Training (DoE, 1995:4), which outlined the vision for education as follows:

"It should be a goal of education and training policy to enable a democratic, free, equal, just and peaceful society to take root and prosper in our land, on the basis that all South Africans without exception share the same inalienable right, equal citizenship, and common national destiny, and that all forms of bias (especially racial, ethnic and gender) are dehumanizing."

This vision further morphed with time to include decisive steps to undo the damage and devastation to which apartheid subjected black people in this country. These steps included the provision of an education system that would build democracy, human dignity, equality, and social justice (De Wet and Wolhuter, 2009:360). While the transformation agenda of the government succeeded in areas such as increased access to schools, improvement in the qualifications of educators, some improvement in the ratio of teachers to learners, and an increase in the per capita spending per learner (Duvenhage, 2006:135), this paper makes a case with the discriminatory employment prospects of newly qualified teachers due to the different sources of funding that are available to them to study for their teaching qualifications, despite the fact that both sources (NSFAS and Fundza Lushaka) get the funds from the National Treasury of the Republic of South Africa (RSA).

2. Theoretical Foundation

At the centre of the vision of post-apartheid South Africa were the promises of education and an education system that would be made readily available to all people, as provided in Chapter 2 of the Constitution of South Africa. Based on this promise and the provision in the constitution, education was classified as a fundamental human right. This vision was

informed by political change, which envisioned education as an economic vehicle for the citizens. The Freedom Charter of 1955 (adopted by the ANC on 26 June 1955 in Kliptown) and the Constitution of the RSA, Act 108 of 1996 serve as the cornerstone documents that support access to education.

Section 29 (a) and (b) of Chapter 2 of the Constitution, respectively, provide that everyone has the right to basic education, including further education, which the state, through reasonable measures, must make progressively available and accessible. The Freedom Charter, on the other hand, provides that education shall be free, compulsory, universal, and equal for all children; higher education and technical training shall be opened to all through state allowances and scholarships awarded on the basis of merit.

In concert with the successes recorded by Duvenhage (2006:135), as indicated on page 2 above, the ideals of section 29 of chapter 2 of the Constitution of the RSA and the Freedom Charter of the governing ANC have been realized. It is, however, important to indicate at this point that realizing the ideal of the provision of free education turned out to be as difficult as the handover of power from the Nationalist Party government to the ANC, as this was an outcome of the loss of many lives. Similarly, the spur-of-the-moment declaration of free post-secondary education by the former president, Jacob Zuma, before his untimely departure from office is seen by many, including the researcher, as a political stunt to put the administration after his financial crisis. The pressure from the "fees must fall" movement in tertiary institutions forced the ANC government to live up to its promise of free education as encapsulated in the Freedom Charter of 1955, which still holds the government accountable for its promises.

The central argument of this paper is, therefore, two-pronged.

- Firstly, it appreciates the government's initiatives to provide a variety of teaching qualifications for prospective teachers, ensuring access to institutions of higher learning for qualifying students and determines the abundance of sources of funding available to deserving students.
- The second prong of the argument is an antithesis of the former. It questions the value of having a myriad of teacher qualifications and an endless list of tertiary institutions that train teachers but with no prospects of employment after graduation.
- The most contentious part is that qualified teachers are not employed based on the funding model that funded their tuition, and this is the subject matter of this paper.

2.1. Definition of Main Concepts

The purpose of this paper is to investigate the funding of teacher education and the employment prospects of teachers in the face of the NSFAS and Fundza Lushaka bursary scheme. This part of the paper defines the main concepts to enable the readers to have a better understanding of the subject matter of this paper.

2.2. National Student Financial Aid Scheme (NSFAS)

National Student Financial Aid Scheme (NSFAS) was established in terms of the National Student Financial Aid Scheme Act, No. 56 of 1999. This Act recognizes the need to redress past discrimination and to ensure equal access to education and training. It is a statutory body funded primarily by the National Department of Education and Training, which provides study loans and bursaries to academically able but financially needy students who wish to study at any of South Africa's public institutions of higher education (RSA, 1999). According to the 2014/2015 annual report of the NSFAS, the scheme funded 186 150 students at universities and 228 642 students at TVET colleges with an amount of R9 billion. These figures are impressive, but the question that arises is whether the students, particularly those who are studying towards a teaching qualification, will get employment after graduation.

2.3. Fundza Lushaka Bursary Scheme

The Funza Lushaka bursary programme was established in 2007 as part of the many efforts to address teacher supply and demand challenges in the basic education sector. Available literature does not say much about this bursary scheme except to emphasize that it was conceived as an initiative of the Department of Basic Education (DBE) to finance the training of teachers specifically for four-year teaching degrees and the Post Graduate Certificate in Education (PGCE). What is evident is that this scheme is entirely financed by the DBE, which gets the funds from the National Treasury, which is also a source of funds for the NSFAS. The question that arises from the analogy above is: "Why are the Fundza Lushaka beneficiaries more favoured and prioritized for appointment than their NSFAS counterparts?" This question is triggered by the fact that in terms of their purpose, both funding models are intended to address the supply and demand of teachers in the education sector. However, the employment prospects favour one over the other.

2.3.1. Section 27

Section 27 is a public interest law centre that seeks to influence, develop and use the law to protect, promote, and advance human rights. Its core business or priority areas include the right to basic education, rights to healthcare and budgeting for socio-economic rights. The latter work priority area of Section 27 is the most relevant to the subject matter of this paper. Working with organizations such as Budget Justice Coalition, Imali Yethu and the Council for the Advancement of the South African Constitution (CASAC) places this organization in a competent position to legally challenge the ills that plague most of our systems, including those in education. Section 27 advocates for human rights-based budgeting with a focus on better prioritization of funding for education and public participation in the budgeting process (<https://section27.org.za/priority-work-areas/>).

2.4. Educational Funding Models

According to The Bridgespan Group, a funding model is a methodical and institutionalized approach to building a reliable revenue base that will support an organization's core programs and services (bridgespan.org). Post-secondary education in South Africa relies on various sources of funding, and teacher education is no exception. Before 1994, teacher education was funded by the homeland governments, but now, that function is mainly carried out by the NSFAS and Fundza Lushaka bursary schemes. The two schemes rely on the National Treasury for funds to carry out their obligation towards needy and deserving students. Some universities have their own in-house funding initiatives for academically deserving students, but the focus of this paper is on state-funded funding models.

2.5. Post-Secondary Education

Post-secondary education, also known as tertiary education, is the education level that follows the successful completion of secondary education, often referred to as high school. It is the education that takes place in universities, colleges and vocational schools, and it culminates in the awarding of a degree, diploma or certificate after completion of a specified duration. A teaching qualification is one example of a post-secondary qualification and post-1994, teaching qualifications have been offered by universities since the closure of the traditional colleges of education.

2.6. Funding Qualification Criteria

This concept is prominently featured in the discourse about the National Student Financial Aid Scheme and Fundza Lushaka. It refers to the requirements potential students must meet to receive financial support through the two funding models indicated above.

2.7. Teacher Education

Tefera and Skauge (nd) cited in Thakrar, Wolfenden and Zin (2009), teacher education lies at the heart of all development schemes and has been tagged as one of the major areas of focus for poverty alleviation, economic progress, and social and cultural development. This suggests that education plays an indispensable role in society, and this can only be experienced through teachers. Given this kind of reality, individuals who intend to be teachers for various reasons, including serving their communities and their own livelihoods, must go through a focused training process to meet the needs of the learners. Teacher education, as defined by the National Council for Teacher Education (NCTE, 2021), is a programme that is related to the development of teacher proficiency and competence that would enable and empower the teacher to meet the requirements of the profession and face the challenges therein.

The Goods Dictionary of Education defines teacher education as all the formal and non-formal activities and experiences that help to qualify a person to assume the responsibilities of a member of the educational profession or to discharge his responsibilities more effectively. In South Africa, teacher education is provided in two sub-systems: Initial Professional Education of Teachers (IPET) and Continuous Professional Teacher Development (CPTD). The former sub-system is the one that was historically called teacher training, and it is the responsibility of the Department of Higher Education and Training (DHET) to offer programmes to aspiring teachers at higher education institutions such as universities. The latter is what used to be called in-service training, which occurs among qualified teachers in their workplaces. The IPET is the focus of this study.

2.8. Pertinent Issues Emerging from the Definitions of the above Concepts and Their Essence in the Subject Matter of This Paper

It has emerged from the definitions and backgrounds of the two funding models (NSFAS and Fundza Lushaka) that they both have their origins in a policy position of the Department of Basic Education (DBE). They are both founded on legislation that focuses on addressing the demand and supply of teachers. It also emerged that the funding models comply with the ideals of the Constitution of the RSA, particularly section 29 (a) and (b), which confirm the obligation of the state to provide basic and further education and training. Section 27 and its associated organizations oversee to ensure that funds set aside for basic and post-secondary education are used for that purpose in concert with the ideals of the Constitution of the RSA.

2.9. Teacher Demand, Supply and Funding for Teacher Training Before 1994 in South Africa

This section of the paper focuses on the period leading to the 1990s and the adoption of a democratic government in South Africa in 1994. This period was characterized by the phasing out of some teacher qualifications in colleges of education and some universities and the adoption of new ones. A typical example of this change is the phasing out of two-year qualifications such as the Primary Teachers' Certificate (PTC) and Junior Secondary Teachers' Certificate (JSTC) and replacing them with the three-year Primary Teachers' Diploma (PTD) and Secondary Teachers' Diploma (STD) respectively. This change is what Wolhuter (2006:124) referred to as a context of educational and societal reconstruction in South Africa. The concept of educational and societal reconstruction and its relevance to the subject matter of this paper will be discussed briefly.

It is important to indicate the locus of this concept in the whole idea of phasing out the two-year teaching qualifications in favour of three-year and later four-year teaching qualifications. This exercise will level the field to explore the demand, supply and funding of teacher education before 1994.

The idea of social reconstruction and how it relates to the phasing out of old teacher qualifications in favour of new ones confirm that as times, places, and people's circumstances change, so do their thinking. When the thinking capacities of people change, new ideas emerge which require them to improve their way(s) of doing things. Biswas (2018)

argued that social reconstruction is a theory that is founded on the belief that it is not only possible but imperative for the rational community to apply itself to the altering of faulty social situations and conditions based on the confidence of the community in its understanding of the source of the problems.

3. Research Methodology

This paper used a qualitative research methodology to collect data that will respond to the main research question. According to Henning, Van Rensburg & Smit (2004) and Caelli, Ray & Mill (2003), qualitative research is concerned with understanding rather than explaining, experiencing naturalistic observations rather than controlled measurement, and undertaking a subjective exploration of reality from an insider's perspective as opposed to the predominant outside perspective in a quantitative paradigm.

The main thrust of this study lies firstly in the hypothesis that the state is deliberately discriminating against the beneficiaries of the NSFAS in favour of those funded by the Fundza Lushaka Bursary Scheme when it comes to the employment prospects of teachers. Secondly, this study makes a case with regard to the two funding models serving the same purpose instead of the state channelling funds through one model to counter what seems to be some form of favouritism that is skewed towards beneficiaries of one model and discriminating against the other. The researcher is conscious of the limitation imposed by the limited literature that deals with the funding models, which are the centrepiece of this study. Given this state of affairs, the researcher relied on the DBE policies as the only literature which informed the adoption and implementation of these funding models.

Interviews were first conducted with the Chief Education Specialist (CES) and Deputy Chief Education Specialist (DCES) from the Teacher Education Development and Governance (TED&GOV) sub-directorate in the Bohlabela Education District. These officials are responsible for marketing and recruiting potential student teachers for the Fundza Lushaka bursary scheme. A focus group interview was conducted with seven affected, qualified respondents of varying ages who qualified as teachers but could not be employed on the grounds that preference was given to those who were funded by Fundza Lushaka first. Four of the seven were funded by NSFAS, and the remaining three did not receive any funding from either Fundza Lushaka or NSFAS, meaning that their parents and guardians funded their four years of study at the university.

3.1. Data Collection Procedures

In this study, I interviewed the two district officials, as indicated above, in a focus group discussion. My expectation from them was to shed light on the funding qualification criteria for the Fundza Lushaka Bursary Scheme and why the recipients of funding from this scheme were given first preference for appointment as teachers over the NSFAS-funded students. I interviewed the four who were funded by NSFAS separately from those who were funded by their parents and guardians, given that their experiences would not be exactly the same. The two groups of potential teachers were expected to reflect on their experiences during their studies, their family backgrounds, how they affected their preparatory years to become teachers, and their post-university (college years) as job seekers without hope. I took down notes as the different groups responded to the questions, and each interview took about an hour, as it was necessary to ask follow-up questions from time to time.

To ensure ethical research conduct, all the participants were notified in advance about the nature and purpose of the research. All the participants gave their informed consent to voluntarily participate in the study. They were also informed that they were under no obligation to continue in the study if they felt uncomfortable, i.e. they were free to opt out of the study without any fear of any negative consequences.

3.2. Presentation and Interpretation of the Results

Before proceeding with the data analysis, I looked at the different responses from the focus group discussions and the responses of the two district officials. The following information emerged from the corpus of their narratives:

On the funding qualification criteria for the Fundza Lushaka Bursary Scheme, the district officials were unanimous in indicating that students needed to have passed their National Senior Certificate examinations with an exemption endorsement or a bachelor's degree admission. They emphasized that the family background of the learners did not count, unlike in the case of the NSFAS, where the gross household income is used as a qualification criterion. The officials indicated that Fundza Lushaka was introduced to specifically address the problem of the shortage of teachers in the country. Therefore, their duty was to recruit students to study for teaching, irrespective of their families' financial backgrounds. They, therefore, indicated that it was for this reason that students who were funded by the Fundza Lushaka Bursary Scheme were given preference for appointment over those who were funded by the NSFAS and those whose parents funded their studies.

One of the criteria which are specific to the Fundza Lushaka Bursary Scheme is that after completion of their teaching qualifications, they were bound to teach in a school that would be determined by the education department for a period which is equal to the duration of bursary funding received (Bursaries, South Africa, 2024). The district officials were, however, mum on the strictness of the DBE on the priority subjects, which included Mathematics, Science and Technology, Accounting, IT and CAT. From the researcher's personal experience as a former principal, the lists of Fundza Lushaka Bursary holders that were sent to schools annually did not always have teachers who qualified in those priority subjects. This, however, is a topic for another research study.

The four prospective teachers who were funded by the Fundza Lushaka Bursary scheme revealed something that showed a disconnection between the provincial departments and the DBE. Some of the students indicated that for the first year of their studies, they were funded by the NSFAS, followed by the provincial department for their second year and

Fundza Lushaka for the last two years. One student indicated that he was funded by both Fundza Lushaka and NSFAS for the last two years of study. The submissions of the students during the focus group discussion and their subsequent appointment as teachers soon after completing their studies portrayed Fundza Lushaka Bursary scheme as a rubber stamp gateway to appointment prospects. While these students received multiple funding offers for their studies, there was a group of three who depended on their parents and/or guardians to fund their studies to become teachers. After completing their studies at the same institutions and graduating with the group of four indicated above, they were struggling to get appointed as teachers. The three students indicated that they met all the funding qualification criteria, but they were just not lucky to get the funding. Their response to the focus group interview was clouded by the difficulties of inadequate financial support from their parents, who were supposed to provide for their siblings as well. Asked if they viewed their situation as discrimination, they responded that they were not sure if it was, but their financial exclusion and subsequent unemployment after their parents sacrificed so much for them to qualify as teachers is something they find strange in a country where there is an acute shortage of teachers.

All the three prospective teachers indicated that for the past three years they were offered contract posts with the condition that if a Fundza Lushaka bursary holder with the curriculum requirements of the post became available; their services would be terminated with a 24 hours' notice. The respondents indicated that they were reminded of the difficulties they went through when they studied without financial support, at times having to go to classes without hunger and their struggles with affordable accommodation. Furthermore, their contract appointments and the promise of termination of service at any time meant that their lives were stagnant. They could not apply for credit and did not qualify for housing allowance or even medical aid. They felt that the system had thrown them to the deep end while others with the same qualifications as theirs were enjoying a full range of benefits as employees of the state.

3.3. Pertinent Issues That Emerged from the Focus Group Narratives

The first thing that came out was the disconnect between the provincial and national departments of education. The fact that some students had the benefit of two funding sources while others had none was unbelievable. It is common knowledge that both the Fundza Lushaka and NSFAS funds are all from the National Treasury and that the Provincial Treasury accounts to the National Treasury for all the funds that it allocates towards funding prospective teachers.

Another issue that emerged from the narratives is a lack of monitoring and evaluation of the extent to which the Fundza Lushaka beneficiaries comply with the specialization requirements of the fund. As indicated above, one of the requirements is that the students must specialize in subjects such as mathematics, physical and natural sciences and technology, information and communication technology (ICT) and CAT. There is substantial evidence that a majority of the scheme, who are favoured with immediate, permanent employment as teachers, have none of the prescribed subjects as their specializations. These two issues, though they are not the only ones, qualify to be classified as unfair discrimination against prospective teachers who were not funded by the Fundza Lushaka Bursary Scheme. Furthermore, the veracity of the issue of a shortage of teachers in South Africa now and in the future becomes questionable if qualified teachers are not employed based on the scheme that funded their tuition.

4. Conclusion

This paper has drawn attention to what the participants in the focus group discussions had to say about the different funding models that were put in place to fund post-secondary education in South Africa, particularly teaching. The study found that the Fundza Lushaka Bursary Scheme was specifically put in place to address teacher demand and supply, and for that reason, prospective teachers who are funded by this scheme get preference for appointment over those who are funded by the NSFAS and other provincial funding schemes. This study, therefore, concluded that depriving people of employment based on the scheme that funded them is unfair discrimination, given that all the funds come from the National Treasury, and it would be prudent for the DBE and the provincial departments to give all beneficiaries equal employment opportunities.

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