



**ISASA**

Independent Schools Association of Southern Africa

**REVIEW**  
**2007/2008**

Quality Values Diversity

# Contents

## **ISASA Today - 3**

### **Introduction - 4**

- Message from the Executive Director - 4
- Message from the Chairman - 5
- Vision and mission - 6
- Membership - 6
- Constituent members - 7
- Affinity groups - 8
- Corporate members - 8

## **Looking Back - 9**

### **Promoting the interests of member schools - 10**

- Engagement with government - 10
- Advocacy - 11
- Policy monitoring and analysis - 12
- Research - 13
- Membership surveys - 13

### **Encouraging best practice - 14**

- International links - 14
- Curriculum support - 16
- Workshops, conferences and events - 16
- One-on-one support to schools - 17
- Quality assurance - 17

### **Strengthening schools' financial sustainability - 18**

- Reduced costs - 18
- Sustainability initiative - 19
- Access to additional resources - 20

### **ISASA Mathematics and English Programme - 21**

- Learner programme - 21
- Teacher-learnerships - 22
- Donors - 22

### **Financial report for the year ended 31 December 2007 - 23**

## **Looking Ahead - 24**

### **Challenges - 25**

### **Opportunities - 26**

---

© 2008 Independent Schools Association of Southern Africa

The contents of this publication may be freely used and reproduced for non-profit purposes, provided full acknowledgement of the source is given. All rights reserved.

Editing: Helene Perold and Philanie Jooste, Helene Perold & Associates, Johannesburg

Layout and design: Limeblue Design, Johannesburg

Project management: Philanie Jooste for Helene Perold & Associates

Photos: Gary Horlor – pp 6 (right), 11, 12, 17

Johnny Onverwacht – back cover, pp 8, 9, 15 (left), 23 (left)

Mike Reed – staff photos

# ISASA Today

**ISASA is a dynamic and growing non-profit organisation with a rapidly changing membership profile. It has expanded its range of services and developed extensive networks both locally and globally, and a number of strategic partnerships.**

**ISASA is an inclusive, diverse association that welcomes independent schools of every persuasion, which meet its quality criteria and conditions for membership.**



# Introduction

## Message from the Executive Director

**W**elcome to the first-ever published Review of ISASA. We hope that you find the contents of this review of our activities informative, helpful and relevant – it is written for you!

During the last year ISASA has been very successful in advancing the value of independent education. We have protected the interests of our schools, built their capacity to implement best practice and manage change, and strengthened their financial sustainability. Through our development programmes and partnerships we have also enhanced their contribution to the public good.

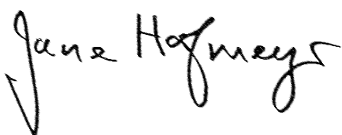
This would not have been possible without the dedication of the central office staff, expertise of the deputy-directors, tireless support to heads, governors and bursars by the regional directors, and the volunteer commitment of the national and regional office-bearers of ISASA and all the members of its governance structures.

In particular, we thank Henry Bennett, whose term of office as Chairman of ISASA has come to an end after six years of selfless contribution, which at times even interrupted his holidays. We will miss his wisdom, light touch and delightful sense of humour. I am deeply grateful for his invaluable guidance and support.

We also wish to thank Paul Channon, who retired as ISASA Deputy-Chairman in September 2007, for his many years of service to ISASA in various capacities. The Leadership Development Programme will stand as a legacy of his significant contribution to the professional development of heads.

This review documents ISASA's activities during the 2007/2008 period. It also shares with you some of the challenges we face as a sector and our future plans. While the forthcoming year is likely to produce a volatile and complex environment for independent schools, we are confident that the gains made during the year under review provide our members with a strong foundation for moving with the changing times. The independent schooling sector has much to offer South Africa and ISASA will continue to seek to serve and lead its members by being strategic, proactive, responsive and consultative.

The ISASA team is grateful for your continuing support.



**Dr Jane Hofmeyr**



*ISASA was realised through ideas and convictions expressed as 'Brave Stretch' in 1998. Today, ten years later, it is serving independent education within the framework of the new South Africa in dynamic ways never dreamt of then.*

Bill Carter, first Chairman of ISASA

## Message from the Chairman

**M**y term as Chairman of ISASA ends in September 2008, so I am bound to be somewhat reflective. During this stimulating period for me, I remember these highlights:



- the expansion and deepening of our human resources of wise and gifted staff, centrally and regionally;
- the increasing diversity of our members and our staff;
- the respect ISASA is enjoying, as an association, from the national and provincial departments of education;
- the active lobbying of the state on key issues, with many positive results;
- working with and through NAISA as the sectoral umbrella body for independent school associations;
- expanding and developing our international links with other associations, heads and bursars;
- establishing ISASA Publications as our own publishing house, with *Independent Education* as its premier publication;
- launching, with significant donor funding, our flagship national development initiative, the ISASA Mathematics and English Programme for black learners and teachers;
- establishing regular quality assurance for ISASA members - a developmental process that provides the stamp of their quality education; and
- the extraordinary growth in our diverse membership, coupled with SAHISA's move to new governance structures for broader representation, and the introduction of independent members from the 'great and the good' in ISASA governance.

I will miss all this excitement, however tumultuous it may be from time to time. My heartfelt thanks go to my deputy chairs over the years, Jane Hofmeyr, John Lobban and Sandile Ndaba, the regional directors and the staff for all their support and guidance, and to the membership for never being boring!

A handwritten signature in black ink that reads "Henry Bennett". The signature is written in a cursive, flowing style.

**Henry Bennett**



## Vision and mission

ISASA's vision is of "vibrant independent schools contributing to quality education for all learners in Southern Africa".

ISASA's mission is to:

- articulate the value of quality independent education;
- build a public-spirited community of diverse independent schools;
- promote their common interests; and
- provide them with professional services.

## Membership

ISASA membership is growing steadily. Typically, from more than 100 schools enquiring about membership each year, we accept some 25 to 30 new members annually. By July 2008, our total membership had grown to 715 schools (counting pre-primary, primary and high schools separately as the provincial education departments do for registration and subsidy purposes).

Our member schools in South Africa, Botswana, Swaziland, Namibia and Angola represent a broad range of socio-economic and cultural communities, philosophies, religious affiliations, and educational levels from pre-primary to post-matric.

We group our members into six socio-economic categories. Published school fees are the main indicator of a school's category, but the profile of learner enrolment, sources of income, extent of financial aid they offer, and physical facilities are also considered.

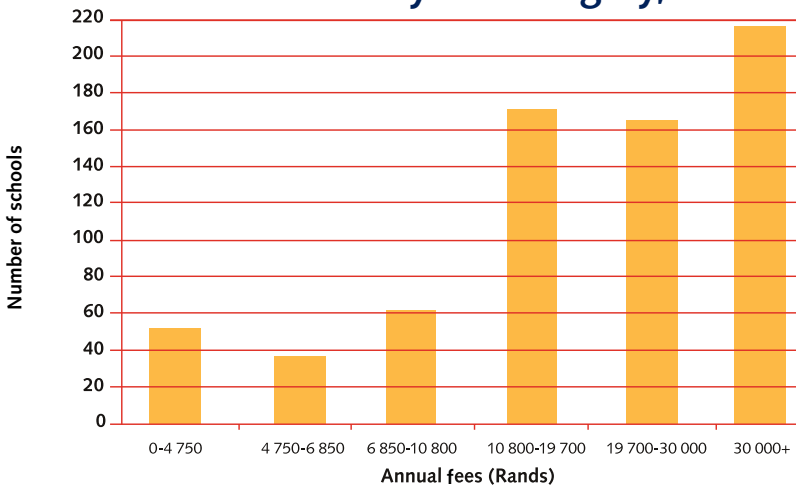
ISASA derives its income from annual membership subscriptions. These are levied equitably on a sliding scale according to the socio-economic category of a school and the number of learners. In 2008, the lowest membership fee per learner is R10 and the highest R120.

ISASA's drive to encourage low-fee schools that meet our quality criteria to become members is producing real results: the largest group of our new members every year is low-fee schools serving disadvantaged black communities and charging fees below R4 750 per annum. Next in growth are the schools charging fees below R10 000 per annum, followed by what we would see as schools serving middle-class families, with tuition fees below R20 000 per annum.

### ISASA profile, 2008

<b>Member schools</b>	<b>715</b>
In South Africa	681
Pre-primary	200
Primary	278
Secondary	203
Outside South Africa	34
<b>Fees</b>	
Tuition (no boarding)	R0 – R62 000 p.a.
Tuition and boarding	R0 – R120 000 p.a.
<b>Learner enrolment</b>	
Total	<b>149 794</b>
Pre-primary	18 111
Primary	74 087
Secondary	57 596
<b>Teachers</b>	
Total (full and part-time)	<b>12 445</b>
Pre-primary	1 489
Primary	5 367
Secondary	5 589
<b>Corporate members</b>	<b>42</b>

## ISASA schools by fee category, 2008



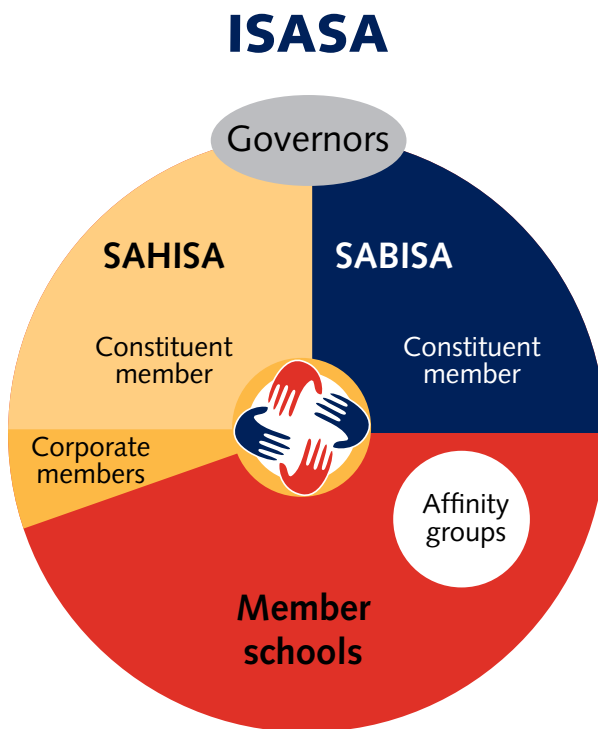
This means that our schools are meeting the needs of a very wide range of Southern African communities. It also means that the number of our subsidised schools is increasing every year; currently it is 30 per cent of our membership.

*I am interested in the growth of independent schools across racial, religious and class boundaries and wish to compliment your organisation on this.*

Duncan Hindle, Director-General: Department of Education

## Constituent members

The Southern African Heads of Independent Schools Association (SAHISA) and the Southern African Bursars of Independent Schools Association (SABISA) are constituent members of ISASA. Membership of these associations is through ISASA and no extra dues are paid. Any head of an ISASA member school may apply for membership of SAHISA and the business manager or bursar of an ISASA school is automatically granted membership of SABISA.





## Affinity groups

Across ISASA schools, there are also a number of active affinity or interest groups such as the Independent Schools Marketing Association (ISMA), the Independent Schools Deputy-Heads Association (ISDHA), school counsellors, sports administrators, chaplains and librarians.

## Corporate members

Corporate members are awarded the status of 'preferred provider/supplier' which recognises their quality and allows them to display the ISASA logo in return for an annual membership fee to ISASA. Schools are encouraged to use corporate member companies when purchasing goods and services.

ISASA now has 42 corporate members ranging in size and focus, from large multinationals like the banks and international publishing houses, to small private companies and non-governmental organisations:

ABSA	Alexander Forbes Risk Services
BoE	Broll Facilities Management
CAMI Education (Pty) Ltd	Cambridge University Press
Compute Corporate Technology Solutions	DK Events
Edit Microsystems	Eduadmin
Edupac	EInstruction
Fedics (Pty) Ltd	First National Bank
Follett International	Glenrand MIB
Group Sports Travel SA	Heinemann Publishers
Horizon Library Services	Imaging Innovations
ITEC Central Johannesburg (Pty) Ltd	ITEC North (Pty) Ltd
Judith Griessel & Associates	Learning Channel
Libwin Library Systems	Macmillan SA (Pty) Ltd
Maskew Miller Longman	Master Maths (Pty) Ltd
McCullagh & Bothwell (Pty) Ltd	Microsoft
Merchant West Asset Finance	Mini Max
Monarc Consulting	Old Mutual Corporate
Oxford University Press SA	Outward Bound
Placements in Education	Riso Africa
Softline Pastel	Shuter & Shooter Publishers (Pty) Ltd
Standard Bank (Pty) Ltd	The Teacher Network



# Looking Back

With a small, committed team of twelve full-time and seven part-time staff, ISASA delivers more than 50 services to its members, in three main areas:

- promoting and protecting schools' interests in the regulatory environment;
- assisting schools to implement best practice and achieve excellence; and
- strengthening their financial sustainability to help them survive and thrive.



# Promoting the interests of member schools

**I**SASA responds to a broad range of challenges, addressing both new developments and perennial problems. During the year under review we achieved considerable success, employing a range of strategies to further the interests of our members:

- monitoring and analysing local and global trends and developments;
- policy analysis;
- advocacy;
- principled, constructive engagement and co-operation with government in key areas;
- an active role in the National Alliance of Independent School Associations (NAISA);
- workshops to help members understand the rights and responsibilities of independent schools; and
- partnerships with other associations and organisations in Southern Africa and abroad.

## Engagement with government

ISASA believes in principled constructive engagement with government and other stakeholders on important matters affecting its member schools. It has engaged vigorously and fruitfully with government on a wide range of education policy matters, in the interests of our sector and the education system as a whole.

Our working relationship with the Department of Education is excellent and we are most appreciative of the readiness of the Director-General and his senior colleagues to meet us and address our concerns.

We believe that the independent sector should be seen as complementary to public education, able to serve as a valuable partner of government in advancing democracy and nation-building through developing high-level skills, building social capital, and reducing inequalities.

Independent schools, however, need sufficient 'space' to follow their own distinctive missions, within the relevant constitutional and legal frameworks. This is essential to enable them to make their unique contribution and provide quality education. Ensuring this enabling environment is a key thrust of ISASA's work.

The National Alliance of Independent School Associations (NAISA), of which ISASA is a founder member, is one of the most important vehicles that we use to engage with government. NAISA is an alliance of nine national and eight provincial bodies which represent more than 1 000 independent schools.

During the last year, ISASA, through Sandile Ndaba, our Deputy Director: Policy, and with the legal advice of Henry Bennett, our Chair, has played a very active role in helping NAISA to make substantial submissions and presentations to government. In August 2008 Sandile Ndaba was elected as Vice-Chair of NAISA.



*I would like to challenge all independent schools to share, contribute to and promote the vision and priorities of the South African government.*

Naledi Pandor, Minister of Education  
St Stithians Founder's Day, 7 June 2008

All our regional directors also represent ISASA on the joint liaison committees/associations in the provinces that engage with the provincial departments of education on behalf of independent schools, to ensure correct implementation of policy and prevent intrusion into inappropriate areas. Two ISASA representatives have also been chosen by NAISA to sit on the statutory bodies whose purview vitally affects our schools - the Education, Training and Development SETA, and SACE, the South African Council for Educators.

Another milestone is that after two years of engagement, in which we were centrally involved, NAISA has developed a signed Communications Protocol with the Department of Education which will promote positive interaction with it and provincial departments of education.

## Advocacy

Continual advocacy about ISASA, its member schools, and the changing profile of the independent schooling sector and its value to the country is vital to counteract negative perceptions about independent schools and safeguard their interests in the rapidly changing legislative environment.

In 2007 ISASA developed an advocacy and communications strategy and a new brand, which it has employed to very good effect. The ISASA brand is a public guarantee of high standards of educational and ethical practice, and a commitment to “a democratic, non-discriminatory society and a diverse, equitable school community”. This is captured in our tagline: *Quality Values Diversity*.

In the year under review, the following communications products have been produced under the new brand:

- A series of focus sheets on topics relevant to schools, parents and stakeholders: *Why Choose an Independent School?*, *Quality Assurance in ISASA Schools*, *The Public Benefit of Independent Schools*, *Curriculum and Assessment*, and *The ISASA Mathematics and English Programme*.
- The re-branded *2008 Directory of Schools* is looking good in its new coat, as are our regular reports to members.
- We keep in continual contact with our schools through electronic updates in the *Weekly Bulletin*, regular *Policy Bulletins*, and the quarterly *Input*.
- Our flagship publication, *Independent Education*, is a widely-read quarterly magazine edited by Mark Henning and distributed to all member schools. It also reaches many public schools, government officials, and sister associations in Southern Africa and abroad. We are pleased to report that the ISASA subsidiary, ISASA Publications (Pty) Ltd, which was established to produce the magazine and other regular ISASA publications, has proved to be a successful venture.
- With the Development Bank of South Africa we also produced a *Guide for the Development of a Community Partnership Programme*, which advises schools on how to set up partnerships with other schools or projects.



The ISASA website ([www.isasa.org](http://www.isasa.org)) receives over one million hits per month, an increase of nearly 400 000 from May 2007. Each month an average of 20 000 people visit the site, which lists all the members of ISASA, the activities of ISASA and its members, and provides access to ISASA services, publications and resources. The website also provides excellent marketing opportunities for schools at no extra cost. Some 500 parent and learner enquiries are routed to schools every month.

As a result of its advocacy strategy, ISASA and its schools have received considerable media exposure through radio interviews and newspaper articles. Highlights were a *Business Day* overview of trends in pre-primary education, and its supplement on independent schools.

Requests for information, briefings and presentations come from researchers, visitors and a wide variety of groups. Presentations by Jane Hofmeyr at the JET conference on *What's Working in School Development?*, the Highveld Forum and Tshikululu Social Investments helped to highlight ISASA initiatives and key developments in the sector.

## Policy monitoring and analysis

A flood of proposed legislation in the last year has necessitated very diligent monitoring and analysis by the ISASA policy team. To keep abreast of all the proposed changes, the team tracks developments in all nine provinces as well as at the national level. This generates the analysis required to provide input to government and take action to mitigate any potential negative impact.

Our ongoing policy work addresses the perennial issues of registration, subsidies, property rates, curriculum and assessment, and the accreditation of independent schools. This has involved many hours of research, analysis, preparation of submissions, meetings with and presentations to education departments, and making presentations to the parliamentary portfolio committees. In the last year alone ISASA staff, both central and regional, were involved in 44 such meetings and 18 conferences or presentations.

We are pleased to report that the outcome at a recent meeting that we secured with Duncan Hindle, the Director-General: Department of Education, will be a workshop for the relevant provincial departments of education officials on the correct implementation of the registration process and subsidies for independent schools.

For our low-fee schools the correct and timely payment of subsidies is essential, because payments that are not made, or are late or reduced, threaten their very survival. Unfortunately the technical nature of the Norms and Standards for school subsidies means that they are not always fully understood by provincial officials, who, through high turnover, are often new to the sector. Non-registration of schools by provincial departments of education is also a serious issue, because until their applications are processed and they are registered, independent schools are technically illegal. Unless a school has been registered for a year, it cannot apply for a subsidy. It is thus vital that ISASA keeps a watching brief on these processes in all provinces and intervenes when cases of administrative injustice are occurring.

The cause of our pre-primary schools, one of the fastest growing sectors of ISASA, became

a new thrust of our policy work this year. We took up the issue of their registration with the provincial departments of education, which is a necessary first step for exemptions or rebates from property rates and the implementation of the recently approved provincial subsidies to pre-schools.

During the first half of 2008, five substantial submissions to government were made by ISASA, on its own and/or through NAISA, on the following proposed legislation:

- National Schools Pledge (March 2008);
- Proposed Amendments to the Norms and Standards for School Funding (February 2008);
- General and Further Education Amendment Bill (March 2008);
- Regulations Pertaining to the Conducting, Administration and Management of Assessment for the National Senior Certificate (June 2008); and
- Criteria on Evaluation, Accreditation and Monitoring of Institutions and Assessment Bodies (July 2008).

## Research

ISASA's research expertise is widely recognised and valued by numerous local and international organisations. Our research yields valuable information and provides insight into developments in our sector and issues of importance to our schools. The research also informs our advocacy work.

Private education for the poor is a developing world phenomenon and has sparked considerable international research led by Prof James Tooley. In Southern Africa the growth of low-fee independent schools serving disadvantaged communities is a dominant trend and is increasingly reflected in ISASA's membership. However, the nature, scope and quality of these schools has not been well researched here.

This will soon change. The year under review saw the start of a large-scale research project by the Centre for Development and Enterprise to investigate the extent and quality of low-fee independent schools. Funded by the John Templeton Foundation in the US, the study will examine both registered and unregistered independent schools, as well as public schools in three provinces - Gauteng, the Eastern Cape and Limpopo. ISASA was asked to help in the design of the research and Jane Hofmeyr serves on the reference group.

## Membership surveys

ISASA conducts a number of membership surveys to assist schools' planning and budgeting, identify their needs, and gather benchmarking information. This year 343 schools took part in the Salary Survey which ranks salaries on a percentile scale across several job descriptions, so that members have comparative benchmarks for remuneration packages. The range of salaries across ISASA member schools is huge: although very good packages are offered by a number of high-fee schools, most schools cannot match the state teachers' packages with their significant benefits. Our low-fee schools cannot afford to offer much in the way of benefits and the salaries of their dedicated teachers are low.

Together with the bursars' association, SABISA, ISASA undertook a Benchmarking Survey of ISASA schools which produces key norms relating to learners, staff, facilities, and funding sources as a resource for schools in their planning. This is made available to bursars at the participating schools.

In the year under review ISASA also conducted a quantitative and qualitative survey of diversity in its member schools. Increasing diversity in ISASA and its members is one of five strategic imperatives of the association. The aim of the Diversity Survey was to determine what progress has been made by its schools in achieving greater diversity at the governance, management, teacher and learner levels. A sample of half our members indicated that on average 33 per cent of learners are black, as are 12 per cent of the teachers. Some schools have made huge strides in achieving significant racial diversity at both the learner and teacher level, but the general level of racial diversity is still too low, particularly at the management and governance levels. The research also provided a valuable overview of successful and unsuccessful strategies used by schools to achieve greater transformation. In response to the findings of this research, the ISASA General Council set up a Transformation and Diversity Committee to assist the association to develop strategies, support and resources for schools as they strive to improve their diversity. ❀

# Encouraging best practice

**I**SASA confers membership on schools that offer quality teaching and learning. It seeks to help schools maintain and improve their quality by implementing best practice in many different spheres - governance, disciplinary procedures, quality assurance, curriculum and assessment, to name but a few.

This is achieved in a variety of ways:

- distributing and workshopping international and local best practice;
- launching new independent partner organisations to provide specialised expertise;
- visiting and communicating regularly with schools;
- undertaking member surveys;
- securing international experts to address members; and
- engaging with international sister associations.

*ISASA's involvement in ISAnet, the Independent Schools Association Network, composed of association executives representing 42 independent school associations in North America, Europe and South Africa, has been mutually beneficial and we value the insights it contributes.*

Connie Wootten, Chair: ISAnet

## International links

The last year has been noteworthy in terms of the valuable international exposure and insights that a number of the association's directors and office-bearers have acquired through visits to the conferences, offices and schools of sister associations in North America, the United Kingdom, and Africa.

ISASA was particularly fortunate in that Jane Hofmeyr elected to spend two months of her sabbatical in 2007 in the USA and Canada, working at the National Association of Independent Schools (NAIS) in Washington DC, speaking at conferences and visiting schools, universities, organisations, and education departments.

During her time in the USA, she and Simon Lee completed a survey that ISASA undertook on behalf of seven national associations of independent schools in English-speaking countries on the internal challenges they face in managing their associations. The report of the findings was well-received by the other associations, and it confirmed how similar the challenges and strategies are that we all use in seeking to run our associations effectively to meet the needs of our members.

Recently, Jane also participated in an international panel on *The Politics and Economics of*



*Independent Schools* at the annual conference in June of the Independent Schools Council (ISC) in England. She followed this with meetings with the Executive Director and staff of the Scottish Council of Independent Schools (SCIS) in Edinburgh and visits to pre-primary and primary schools.

This enabled her to bring back to ISASA new ideas, information and experiences to inform the strategic thinking and best practice within the association and our schools. These insights were strengthened by the attendance of Sandile Ndaba at the excellent NAIS conference in February 2008, coupled with school visits, and John Lobban's participation in a School Sustainability Institute of the National Business Officers Association (NBOA). Representatives of SABISA, Mike Acutt and Phil Fraser, also attended the NAIS and NBOA conferences. As a result of these interactions, a partnership with NBOA was initiated to adapt their approach to school sustainability for use by our members, as part of ISASA's strategic imperative of facilitating schools' financial sustainability.

Based on the exciting initiatives and innovative approaches in the schools they saw, the three directors have written articles in *Independent Education* and given presentations in all our regions on *What's on the School Radar Screen?*

### **International speakers**

Our overseas links have enabled ISASA to identify international experts whom we have brought out to South Africa to share their expertise with our members. These speakers have included Rachel Simmons, an expert on the psychological aggression of girls, Mel Levine, a renowned cognitive scientist who presented a workshop on *Educating all kinds of minds: A non-labelling approach to understanding differences in learning* at the SAALED Conference, and Rob Evans, a well-known American clinical psychologist who has spent most of his life consulting in independent schools, and is the keynote speaker at the SAHISA/ISASA Conference in September.

### **African connections**

ISASA's connections with African countries have expanded in 2007/8. Our footprint is significant in Southern Africa through our member schools in neighbouring countries, which enrich the association's access to different models and approaches to education. There are also strong networks in other parts of the African continent. Jane Hofmeyr again presented workshops on governance and private education for the poor at the CHISZ Conference of Zimbabwean schools, and she was joined by Annette Woolley of SAHISA who made a presentation on inclusion. Our support to the embattled schools there was hugely appreciated.

Brendan Brady, also of SAHISA, attended the annual conference of the association of Botswanan independent schools, maintaining that important link.

New links were established with Nigerian independent schools. John Lobban, Deputy Director: Membership, has been in discussion with a deputation of Nigerian principals and owners who have visited ISASA twice to seek our help in establishing a similar association. These important connections affirm our African roots and the contribution ISASA makes to the independent sector in other African countries.

## Curriculum support

With 2008 as the first year of South Africa's new school-leaving examinations, the National Senior Certificate (NSC), ISASA's strategic priorities include curriculum support and capacity-building for our schools to help them master the outcomes-focused approach and new learning areas and assessment methods. We were particularly fortunate that Sandile Ndaba, who had previously managed the national state examinations for Umalusi, could contribute his expertise and experience to this process.

The ISASA directorate is positive about the new National Curriculum Statements. These have ushered in long-overdue curriculum change, which has introduced an improved outcomes-based approach to learning, updated content, and raised the cognitive demands in line with international standards. We have worked with the Department of Education to help refine the curriculum and its implementation, and believe that in the hands of good teachers, it promises to develop high-level skills and prepare learners for the demands of life and work in Southern Africa and the global village.

*ISASA has partnered and supported the Department of Education in many ways in the implementation of the National Curriculum Statement. ISASA and its member schools have commented on the content of the curriculum, the content and format of the guideline documents and the examination exemplars developed for grades 10, 11 and 12. They have shared their expertise in the screening of textbooks and training of teachers. ISASA is and will continue to be an important partner in the delivery of quality education in South Africa.*

Penny Vinjevold, Deputy Director-General (FET): Department of Education

We initiated our support to schools with a succinct guide to the National Senior Certificate produced by Sandile Ndaba, which was very well received by schools and government. Next, Lindsay McCay conducted a Curriculum Needs Survey from early learning to grade 12 among our South African member schools. This revealed that teachers wanted assistance in accessing suitable resources for teaching and learning, and their planning, teaching and assessment of the National Curriculum Statements at all phase levels. The most immediate need for support was expressed by the grade 12 teachers in their preparation for the mid- and end-of-year examinations for the NSC, and especially for access to examination exemplars.

Most ISASA schools in South Africa write the examinations of either the Independent Examinations Board (IEB) or the state. To make sure that we were up-to-date on all developments so that we could respond to school queries with the correct information, we interacted regularly with the IEB, the national department and provincial education departments. We are particularly grateful that Penny Vinjevold, Deputy-Director General of the FET phase, was willing to meet with both the SAHISA and ISASA executive committees to directly address the curriculum and assessment issues voiced by our schools.

Through this interaction, we were able to inform our schools about the Education Department's curriculum and assessment guides and resources, including examination exemplars, on the Department of Education's web portal, Thutong, which they could access. Similarly, the IEB has produced examination exemplars and other resources, and held training workshops and meetings for its schools.

We will continue to support our members by responding to their queries and investigating their concerns, so that they are able to prepare their learners well for the examinations.

## Workshops, conferences and events

Through regular workshops for governors, heads and bursars on governance, disciplinary procedures, registration and subsidies, John, Jane and Sandile have helped schools to



understand their rights and responsibilities and implement best practice in these areas. Many conferences supported by ISASA were held during the year at member schools and hosted by the associations. The most notable of these were *Principals for Principles*, the SAHISA Conference in August 2007, the SABISA 2007 conference, *The Business of Education in Southern Africa*, and the Proudly Primary conference, *Taking the Lead*.

### **Collegial interaction**

Not only do these conferences and workshops provide opportunities for acquiring new knowledge and skills, but they allow heads, governors, bursars and teachers to share ideas, expertise and experience in collegial interaction.

In the impersonal electronic world, members enjoy opportunities to get together. This year we have organised a number of special social functions, such as lunches and cocktails for governors, corporate and honorary members to inform them about ISASA and its value-adding services and to give them a chance to meet one another and interact with ISASA staff. One of the special occasions was a lunch for 20 honorary members of ISASA and SAHISA who also enjoyed catching up with old friends and finding out about ISASA today.

### **One-on-one support to schools**

One-on-one support to our members is provided primarily by our seven part-time regional directors who work tirelessly to communicate with, support, and visit as many as 100 schools in their regions at least once a year. Coupled with their support to the regional office-bearers of ISASA, SAHISA and SABISA, this work is a huge load.

Visiting heads, board members, bursars, and staff in their schools is one of the most inspiring, rewarding and pleasant aspects of the work of the directorate. Given the incredibly rich diversity of its member schools, these visits are vital to enable ISASA to understand their different circumstances and range of needs, so that we can respond immediately to them and develop new services to help address their challenges.

### **Quality assurance**

As a condition of membership and for school improvement, ISASA schools are required to undertake an evaluation once in each five-year cycle. The Independent Quality Assurance Agency (IQAA) has been contracted by ISASA to undertake these evaluations, and complements the accreditation work of Umalusi by creating a culture of self-evaluation, professional development, and school improvement. By the end of 2007, 153 ISASA member schools had been evaluated by the 23 IQAA mentors, and by the end of 2008 a further 103 will have been evaluated. Reports from the evaluated schools are very positive: "We were all immensely impressed by the way in which the IQAA team worked with our staff, by the support that we received before, during and after the visit, and by the results that emerged from the process," said Brian Mitchell, Head of Clifton School in Durban. ❀

# Strengthening schools' financial sustainability

One of the important areas of ISASA's service to schools is financial assistance in a number of forms:

- offering group services, products and expert advice at discounted rates;
- lobbying against legislation with costly implications for schools;
- monitoring the implementation of subsidies in the provinces;
- reducing the risk of legal action;
- providing comparative benchmark information from surveys;
- assisting schools to address their affordability/financial sustainability;
- free marketing on the ISASA website; and
- access to additional funds through ISASA partnerships and programmes.

We have been very active in all of these areas during the last year to the benefit of our schools.

## Reduced costs

### Group services and products

ISASA provides group services at huge cost savings. Included in ISASA subscriptions is public liability insurance of R19 million which costs ten times less per pupil than individual schools could obtain. Member schools also have access to the ISASA Pension and Provident Fund and a medical scheme for their staff.

Other benefits include a comprehensive *Employee Relations Manual*, including model contracts for staff, parents and learners, and codes of conduct, accompanied by training workshops to reduce the risk of very costly legal action. We secured risk management products and services at reduced rates, and we have also negotiated reduced group rates for labour relations consultants to provide expert advice to schools.

### Lobbying against legislation with cost implications

One of the greatest current threats to the sustainability of independent schools is property rates. Historically, independent schools were exempted from paying property rates, but this changed with the Local Government: Municipal Property Rates Act (2004).

Through early lobbying of government, submissions and presentations to the portfolio committee, ISASA was able to secure key changes in the Act and Guidelines which provided for exemptions and rebates for public benefit organisations and schools.

In order to assist schools with valuations, re-zoning, and objections, ISASA formed the Rates Services Team (RST), which contracted Graham Ewing of Graham Barclay Ewing & Associates, to provide a generic professional and lobbying service fully funded by ISASA.

During the last year, through the RST and close monitoring of developments in municipalities' rates policies, ISASA has been able to obtain significant rebates or total



exemption in key municipalities for its schools. This can have the effect of saving a high-fee school, for example, over R4 million per year.

ISASA has made numerous submissions to different municipalities on the Municipal Property Rates Act and municipal rates policies to ensure that municipalities are following the provisions of the Act and correct processes, and that independent schools can qualify for exemptions or rebates from property rates.

We have also contracted with a firm of attorneys to undertake group legal action against cases of administrative injustice.

## Sustainability initiative

Independent school fees in most countries are rising faster than inflation. The same is true here and if this trend continues, it will threaten the affordability and sustainability of schools. At the simplest level containing school fees depends on either reducing costs by, for example, increasing class size, or reducing subject choices, or by creating alternative sources of income, such as endowments or income-generating projects.

It is clear that traditional strategic planning is unlikely to produce a solution to financial sustainability, because it seldom sufficiently challenges old assumptions and paradigms, and so reproduces more of the same. New strategies need to be employed to address this critical issue.

As reported above, ISASA is delighted that our partnership with NBOA will enable us to adapt the NBOA approach to school sustainability for our schools' circumstances. This approach brings a group of the key players in schools (such as governors, bursars, heads, teachers, marketers, fundraisers) together in a structured process to re-examine their assumptions and chart a new sustainable strategic direction. Early next year we will launch a new initiative led by John Lobban to bring out Sarah Daignault, Chief Executive of the NBOA, and Prof. Jim Honan of Harvard University, who will work with groups of bursars, heads, and governors, helping them to understand, adapt and use the model so that a crucial mass of people in our schools can then train others in its use.

## Staffing and remuneration

Another huge challenge that schools face in their budgeting is how to match the 15 per cent increase in state teacher salaries this year and find quality teachers when they are in very short supply, especially to teach mathematics, science, English, Afrikaans, ICT and business studies. ISASA has been investigating a range of strategies that could help schools address this challenge and is engaging with government and other organisations to keep abreast of initiatives to increase teacher supply.

From our meetings with the Department of Education we were delighted to learn that there is a new interest in teaching as a profession and government's teacher incentives and bursaries are producing results. In 2008, 5 100 bursaries were awarded to student teachers and in 2009, the Department plans to offer 9 000. It is also considering re-opening the colleges of education to increase the country's capacity to train more teachers.

We have continued to encourage members to grow their own teachers through the very effective means of school-based teacher-learnerships or internships with bursaries provided by the ETDP SETA and donors through our Mathematics and English (M&E) Programme. These provide an excellent means of developing high quality black teachers, and will assist schools to increase the diversity of their staff.

Recent government policies indicate that in future schools will be able to use teacher assistants/aides to assist their teachers in classrooms.

There have also been some promising developments with regard to work permits for foreign teachers. Government has allocated a quota of work permits for foreign teachers in selected subjects. This means that schools will be able to hire teachers, such as those from Zimbabwe who are already in the country, with work permits.

In the new Occupation Specific Dispensation government has modernised teacher promotion and salary progression and remuneration scales. Independent schools will need to do likewise and re-examine their remuneration and staffing structures. They will also have to examine increasing class sizes, reducing the range of curriculum offerings, and resisting the 'arms race' for facilities.

## Access to additional resources

### Professional development

The shortage of teachers is exacerbated by a shrinking supply of experienced and prospective heads as the baby boomers retire and the pressures and workload of the position discourages applicants for headships.

ISASA, SAHISA and SABISA have turned their attention to supporting and developing heads of schools. Professional development opportunities through the ISASA Staff Development Fund are made available to heads, bursars and teachers. Nine visitorships and two conference participation awards were made for 2008. The visitorships were worth R16 000 each and the conference awards R10 000 each.

SABISA has worked closely with the Western Cape Education Department to develop a joint programme at FET colleges for the training of bursars, the Certificate in School Business Management for administration (CSBM). This has now received formal accreditation and has been launched at three colleges. Sponsorship from ISASA and the Western Cape Education Department has been provided for nine bursars from low-fee member schools.

### Training grants from the ETDP SETA

Through our representatives on the ETDP SETA and the constant interaction of our staff with the SETA, ISASA has been able to secure over R2 million from the SETA for the training of a wide range of staff at our schools: R1 570 000 for bursaries for teacher trainees in schools; R200 000 for IEB Assessor Training; R100 000 for the UNISA Mentorship Programme; and R200 000 for heads and bursars from low-fee schools to participate in the Leadership Development Programme through Wits Business School (WBS) that will be run again in 2009. This is a customised programme developed jointly by the WBS and SAHISA and SABISA.

### Funding through ISASA partnerships and programmes

Through a longstanding partnership with the Development Bank of South Africa, 32 mid-fee ISASA schools have been able to obtain loans and technical assistance at lower interest rates than those available through commercial banks. The loans granted total approximately R250 million.

ISASA has maintained strong links with the International Finance Corporation (IFC) over many years. The good news for our low-fee schools is that recently the IFC has approached ISASA to assist it in research on low-fee schools' financial needs and credit-worthiness, with a view to introducing an IFC programme of affordable loans and technical assistance for them.

Through the ISASA Mathematics and English Programme which is described more fully on page 21, learner and teacher-trainee bursaries are available to participating schools. ❀

# ISASA Mathematics and English Programme

**I**n 2007 ISASA launched a Mathematics and English (M&E) Programme that draws on the quality education offered by its member schools to help solve a root cause of South Africa's pressing skills shortage: the very small number of school-leavers, especially disadvantaged African learners, who pass mathematics, and the critical lack of qualified mathematics teachers.

The programme seeks to increase the number of black learners and teachers by selecting candidates with potential in mathematics and English and providing them with donor-funded scholarships to obtain quality education and training in ISASA schools.

Evaluations have shown that immersion in a full-time curriculum with intensive academic study and support produces the best results in overcoming disadvantaged education. Proficiency in English has also been identified as a critical success factor for good results in mathematics.

The programme is run by Ros Jaff, the Programme Manager, and Gwen Williams, the Academic Co-ordinator, who keep close contact with the schools and the participants. They are supported by an executive committee.

## Learner programme

The selected learners are placed in grade 10 for the FET phase in order to help them to obtain university entrance passes in mathematics and English, and the set of skills required to succeed in higher education.

*To show that I really appreciate the bursary I will work hard to keep my grades high ... I hope you can do this for other children.*

Tholoana Ntokoane, learner

A wide range of ISASA schools with the commitment and relevant expertise are involved: specialised bridging schools, low-fee schools serving black communities, mid-fee schools with very integrated learner enrolments, and high-fee schools with excellent resources. The schools provide the students with quality tuition, mentoring and extra support, and contribute financially to the cost of uniforms, meals, transport, and where available, school boarding.

In 2008 the programme is thriving: the second intake of 130 learners has brought the total number to 275 in 19 host schools. The external evaluation of the programme's impact has begun with baseline tests and interviews of learners and mentors.

In addition to their full school curriculum in their host schools, learners attend two camps each year. These provide academic remediation, offer outdoor learning experiences, and address individual needs. The learners realise that they are part of a special group and appreciate the opportunity to share their experiences, challenges and successes.



## Teacher-learnerships

This year the teacher-learnership component of the M&E Programme began with 33 teacher interns who were awarded donor-funded bursaries after a rigorous recruitment and selection process from 2 000 applicants. They have been placed in 15 ISASA schools in Gauteng, KwaZulu-Natal, Limpopo, Mpumalanga and the Western Cape for school-based training while completing their professional qualifications.

Each teacher intern is paired with a trained school mentor to support their practical learning and the mentors come together regularly to discuss common challenges, share their expertise, and plan group learning experiences for the trainees. Both interns and mentors are also brought together for group learning opportunities.

Both learners and trainee teachers have been given enrichment opportunities this year: a selected group of high-achieving learners were taken to the Grahamstown Festival, and the teacher interns participated in the Association for Mathematics Education of South Africa (AMESA) Conference which extended their professional learning opportunities.

*I am very grateful to ISASA for the awesome work you are doing out there to revolutionise many youngsters' lives through education ... I sincerely express my gratitude for the life-changing and mind-empowering experience at the AMESA conference.*

Zacharia Mashinini, teacher intern

Looking towards 2009, we are excited by the quality of the hundreds of applications that have been received from prospective teachers and learners for the 2009 intakes, and encouraged by the interest of new potential donors.

### Donors

**The R30 million learner programme and R10 million teacher programme over three to four years has attracted significant funding, for which we are very grateful, from the following donors:**

- Zenex Foundation
- Epoch and Optima Trusts
- Firstrand Foundation
- Billiton
- D.G. Murray Trust
- South African Breweries
- Lowenstein Trust
- BoE



*Freedom for poor people is access to quality education.*

Dr Mamphela Ramphele, 2008

## Financial report for the year ended 31 December 2007

The association has recorded excellent financial results for the year ended 31 December 2007. Income from subscriptions has increased by more than 12 per cent to exceed R9,3 million. This has been achieved despite below-inflation-rate subscription fee increases and specifically as a result of an increase in member schools and learner numbers.

Other income has also increased considerably over the past year to exceed R927 000. In particular, efficient cash management together with the increase in interest rates has contributed to a significant improvement in investment income.

The association's expenditure for the year was contained to less than the subscription revenue, resulting in the realisation of an accounting surplus for the financial year, approximately equivalent to "other income".

The association's Balance Sheet is healthy with reserves of R9,6 million at 31 December 2007. The cash and near-cash portion of the reserves is R5,7 million which represents approximately seven to eight months' operating expenses based on the past financial year's performance. The remainder of the reserves is invested in non-current assets, property, plant and equipment.

To conclude, the financial position of the association at 31 December 2007 is sound with a strong operating surplus and Balance Sheet. The financial affairs are well managed and controlled by management who are to be commended on their efforts.

*Colin Smith, CA (SA): Auditor*



# Looking Ahead

**ISASA's fundamental task is to secure an enabling environment that allows our schools sufficient independence to follow their distinctive missions, and facilitates their financial viability so that they can survive and thrive. We also seek to assist schools to meet the challenges of our times, successfully chart new directions and seize new opportunities.**

To this end, we developed a new strategic plan for 2008 to 2010 with five imperatives: promoting and protecting independence; ensuring schools' financial sustainability; enhancing schools' capacity; increasing diversity in ISASA and its members; and managing an effective, sustainable ISASA.

Every year the directorate reviews its progress against the detailed strategic plan and presents a report to the ISASA Council. All ISASA staff are appraised for their contribution to the achievement of these objectives.

As this report shows, during the year under review, we have made strides in all five strategic areas, both in terms of addressing the challenges and capitalising on opportunities on behalf of our members.



# Challenges

*Mindful of your own challenges, you must continue to promote the principle of relentless freedom and democracy as it is the foundation upon which issues of human rights are ingrained.*

Nelson Mandela, 16 June 2008, Cape Town

**M**any of the challenges we face in South Africa are common to independent school sectors in other countries. To highlight but a few: undue government intrusion, accreditation and reporting demands, challenges to schools' public benefit status, environmental sustainability, affordability, significant changes in curriculum, assessment and examination systems, teacher shortage, and the implications of the ICT revolution and latest brain research for teaching and learning.

ISASA has to meet two basic challenges, one internal and the other external:

- serving a diverse, growing membership with ever-increasing needs, within the constraint of limited resources; and
- promoting the interests of our schools and protecting their independence and financial viability.

In 2009 we anticipate that the following issues will demand most of our attention:

- Internally, we will be expanding the representation of governors and independent members on our Council; supporting the needs of SAHISA and SABISA as effective constituent associations of ISASA with re-defined roles and responsibilities; and enhancing our consultation and communication within the new guidelines. Promoting racial diversity in ISASA and member schools will continue to be a priority.
- The external environment is likely to be very turbulent and testing. It is likely to see a raft of legislation that could affect our schools, both in the last months of Thabo Mbeki's presidency, and following the change in government after the elections. Continual monitoring, analysis, advocacy and lobbying will be essential, as will our efforts to strengthen the sustainability of our members. ISASA will continue to support member schools in key areas such as curriculum and assessment, the recruitment, training, retaining and remuneration of teachers, and financial sustainability. ❁

# Opportunities

The strengths of ISASA lie in the rich diversity and quality of its members, its wide range of professional services, up-to-date information, policy expertise, direct support to schools, successful initiatives, expanding global and local networks, and many partnerships. These strengths position us well to take advantage of new opportunities for the benefit of our members and the wider society.

Next year we anticipate more international exchanges and partnerships overseas and in Africa. Useful information and benefits for our members are likely to flow from our involvement in the Centre for Development and Enterprise and International Finance Corporation research projects on low-fee schools. We are likely to see additional donor funding and the participation of more schools in the ISASA M&E Programme to develop black learners and teachers. We also envisage closer working relationships and collaborative ventures with government on matters of critical sectoral and national importance.

The road ahead is a challenging one for ISASA and independent schools, as they endeavour to remain relevant and effective in a “vuca” environment: **v**olatile, **u**ncertain, **c**omplex and **a**mbiguous, where the worlds of learning and work are changing constantly. Given the successes it has already achieved, however, ISASA believes that its experience, expertise and commitment to the cause of independent education will stand it in good stead to address the challenges, capitalise on new opportunities, continue to support its members with relevant and effective services, and assist them to embrace change. ❁

*As the imperative grows for organisations to help their members develop a global perspective and knowledge base, NAIS and ISASA [are] learning from one another and recognising that many of the challenges and solutions facing schools in a global world are themselves universal.*

Patrick F. Bassett, President: National Association of Independent Schools (NAIS)



Executive Committee



Regional Directors



Office staff

**Executive Committee**

Front row (left to right): Jane Hofmeyr, Abdul Rajah, David Wilkinson  
 Middle row (left to right): Henry Bennett, Sandile Ndaba, Greg Theron  
 Back row (left to right): Mike Acutt, John Lobban, Melvin King

**Regional Directors**

Front row (left to right): Sue Hill, Theo Buccoli, Lyn Nelson  
 Back row (left to right): Tom Bourquin, Jan Immelman, Ronnie Todd, Reimer Mielck

**Office staff**

Front row (left to right): Daphne Mtombeni, Sandile Ndaba, Jane Hofmeyr, John Lobban, Joyce Mdlongwa, Rubby Dhunpath  
 Back row (left to right): Agreement Ngubane, Lindsay McCay, Simon Lee, Lesley Roberts, Kim Curran, Maria Mhlongo



ISASA Offices  
16 St David Road  
Houghton  
2198

PO Box 87430  
Houghton  
2041

Telephone: (011) 648 1331  
Fax: (011) 648 1467  
[www.isasa.org](http://www.isasa.org)