SURVEY OF RESOURCE & TRAINING ORGANISATIONS SUPPORTING EARLY LEARNING PROGRAMMES IN SOUTH AFRICA

NECDA
WORKING IN PARTNERSHIP
"Building a better Future for Children"

UMON CEDI
UNLOCKING QUALITY ECD

AUGUST 2023

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Contents

Acronyms

DBE	Department of Basic Education
DHET	Department of Higher Education and Training
DSD	Department of Social Development
EPWP	Expanded Public Works Programme
ETDP	Education, Training and Development Practices
FET	Further Education and Training
GETC	General Education and Training Certificate
FETC	Further Education and Training Certificate
NPO	Non-Profit Organisation
NQF	National Qualifications Framework
NCV	National Certificate Vocational
PBO	Public Benefit Organisation
QASS	Quality Assessment and Support System
QCTO	Quality Council for Trades and Occupations
RPL	Recognition of Prior Learning
SACE	South African Council for Educators
SAQA	South African Qualifications Authority
SETA	Sector Education and Training Authority
TVET	Technical and Vocational Education and Training

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EXECUTIVE SUMMARY

The National Development Plan 2030[1], which sets out the country's strategic plan and vision for 2030, promotes early childhood development (ECD) services as an education sector priority. To realise this, the plan provided for a policy and programme shift in which the Department of Basic Education (DBE) takes the core responsibility for the provision and monitoring of ECD services. This shift became effective in April 2022 and provides a significant opportunity to improve ECD service provision.

The national Thrive by Five Index study in 2021[2] found that only 46% of children 50 – 59 months old attending early learning programmes (ELPs) are developmentally on track for early learning (for the beginning of Grade R). To address this, there is a need to ensure ELPs are of sufficient quality to improve learning and social and emotional outcomes. A key improvement strategy will be to upgrade the skills and competencies of ECD staff. This will involve increasing access to staff qualifications and skills training, as well as ongoing support for ECD staff. The extent of the challenge was identified in the 2021 ECD Census which found that only 52% of the existing 165 059 ECD practitioners have an ECD qualification at NQF level 4 – 9,

and 27% had undergone a relevant skills programme. The Census indicated that 22% had no relevant qualification. Ilifa Labantwana have modeled that an additional 300 000 practitioners and assistants would be required in order to reach universal access to early learning[3].

To support sectoral efforts to strengthen ELP quality, as well as a human resource development strategy, there is a need for recent data to understand the potential providers of training and support services by scale, location and type of service. The last survey of this kind took place in 2012. Reference to the 2012 findings is made throughout this report.

Method

A database consisting of 139 ECD resource and training organisations (RTOs), involved in the training and support of services and programmes for young children, was developed for the purpose of this research. The database was developed using several existing resources and networks. A comprehensive online survey was distributed to contactable

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[1] Republic of South Africa. (2012). Our Future Make It Work. National Development Plan 2030. Pretoria.

[2] Giese, S., Dawes, A., Tredoux, C., Mattes, F., Bridgman, G., van der Berg, S., Schenk, J. & Kotzé, J. (2022). Thrive by Five Index Report. Revised August 2022. Innovation Edge, Cape Town. www.thrivebyfive.co.za

[3] Brooks, L. & Bornman, S. (2022). State investment in early childhood development sector can empower women and combat gender-based violence. *Daily Maverick.* https://www.dailymaverick.co.za/article/2022-10-31-state-investment-in-early-childhood-development-sector-can-empower-women-and-combat-gender-based-violence/

organisations. The response rate was high (80%), after accounting for organisations who could not be contacted, had closed, or did not meet inclusion criteria.

A desktop scan of TVET offerings was also conducted, using a number of databases provided by the Quality Council for Trades and Occupations (QCTO), Education Training and Development Practices Sector Education and Training Authority (ETDP SETA), and the Department of Higher Education and Training (DHET).

Key Findings

Provincial coverage: Child population estimates, as well as the number of established ELPs, are highest in Gauteng, KwaZulu-Natal and the Eastern Cape. The majority of the survey sample are located in the Western Cape (51%) and KwaZulu-Natal (42%). Only 30% of the sample is based in Gauteng.

RTO targets: The majority of the survey's sample (89%) consider their main offering to be early learning resourcing (i.e., providing early learning materials and resources to ELPs), and 95% target non-accredited early learning practitioners. Training is generally aimed at both in-service and pre-service trainees.

Training programmes: Just under half of the survey respondents (49%) are accredited with the ETDP SETA. In terms of level 4 qualifications, a total of 31 respondents offer the historic Further Education and Training Certificate

(FETC): ECD qualification (ID 58761) while 8 offer the Occupational Certificate: ECD Practitioner (ID 97542). Information provided by the EDTP SETA and the QCTO indicate that private providers and public TVETs are the primary providers in terms of both level 4 and level 5 qualifications. Thirteen survey respondents offer the level 5 Higher Certificate: ECD (ID 23117/ 64649), while 11 offer the Diploma: ECD (ID 23118/64650). Accredited programme enrolments were highest for the level 4 FETC qualification. Most respondents report their accredited programmes being 12 - 20 months in duration, a substantial practical element to the qualifications training, and a high number of on-site visits post-training.

There were slightly over 700 learnership placements in 2022, offered by only 12 survey respondents; 12 respondents were also formally offering Recognition of Prior Learning (RPL), with 200 placements being offered by TVET colleges in the same period as part of an ETDP SETA project.

Non-accredited training was the largest offering: 89% of respondents report offering this form of training; 337 programmes in total are available via respondents. The most common type of non-accredited programme focuses on curriculum-based practitioner training, followed by parent or caregiver support programmes. In 2022, a total of 76 503 trainees were enrolled in these non-accredited programmes. The majority (60%) of respondents offer these programmes to trainees for free.

Trainees: The province with the highest number of total trainees was Gauteng. The majority of trainees are female, and most trainees fall within the 26 - 35 years, and 36- 50-years age bands. Trainees working in parent education programmes account for the largest proportion of trainees. This finding might be explained by the size, spread and variable nature of parenting programmes and it is also likely to include practitioners undergoing parent training.

Staffing: The total full-time and volunteer staff complement of responding RTOs is just over 5,000 in 2023, a notable increase since the last 2012 survey. In terms of total staff size, most organisations have between 11 and 20 staff members. Almost all respondents (95%) report that the organisation's director has received some form of leadership/management-specific training and support. This is an improvement since 2012, when 41% of managers had not participated in any form of leadership or management training. The number of trainers employed at organisations included in the survey is between 1 and 83, with a median of 5 per organisation. Just over half of these trainers (57%) are above the age of 41, while 43% are between 20 and 40 years old. The majority of these trainers (76%) have more than five years of experience in the sector. Close to one-quarter of these trainers did not have an ECD-specific qualification; with 30% having obtained a diploma as their highest educational qualification.

Stakeholder relationships: Most respondents (75%) liaise with their provincial Department of Basic Education and all but 5 report belonging to sectoral networks. The most widely joined network is BRIDGE, followed by the National ECD Alliance (NECDA).

Funding and sustainability: There is a substantial reliance on donor funding, and a notable decrease in government funding since the 2012 survey. Respondents also appear to be making a notable effort to generate their own funds through independent revenue streams, as well as diversify the number of funding sources that they rely on. Just under half of the sample (49%) rely on between 6 and 10 funding sources. When asked to specify the support needed to increase their training capacity, 76% of respondents noted the need for financial support.

TVET offerings: TVET colleges provide the bulk of accredited training in the FET band. With regard to enrolments, survey findings indicate that RTOs account for roughly a fifth of the training capacity of public TVET colleges.

Key implications: (1) Given that registration of the historic qualifications has expired and the 191 programme will be fully phased out by 2025, the limited numbers of accredited providers for the Occupational ECD Practitioner Qualification (97542) is a concern. Similarly, there is no current replacement for the deregistered Unit 2 and 3 Standards which provide a skills programme for assistants and ECD practitioners unable to cope with the demands of NQF level 4 and above. These points are particularly critical in light of

the training gap highlighted by the 2021 ECD Census. (2) The survey findings confirm that the majority of non-accredited providers are focusing on curriculum-related issues (including play and literacy), management and parenting support. These are key domains identified in recent quality studies[4] [5] [6] and are key domains in the draft QASS system. Endorsement of these short courses with SACE will provide an avenue for recognition for both providers and participants. (3) The survey highlighted the need for a consolidated current database of enrolments in, and completions of, accredited qualifications, as well as information on funding sources and allocations for subsidised training. (4) The need for funding to enable organisations to operate continues to be a major constraint for many RTOs. The survey highlights the continued dependence of the RTO sector on donor funding, as well as growing attempts to generate self-sustaining income (which can be argued to dilute capacity for service delivery and core business).

Recommendations for future research: (1) To get a more in-depth and comprehensive view of training in the sector, we recommend a complementary survey of private providers of ECD qualifications, particularly to assess their reach in lower income areas. (2) It would be beneficial to follow up with this survey's non-

respondents to establish whether they are still operating and to establish an RTO attrition rate for the sector. There are a number of established RTOs who did not respond to survey requests who are key service providers in particular areas within the country. (3) While substantial efforts were made to map as many RTOs as possible, there are a number of organisations (large and small) that were not reached or might not have made it onto our initial list of organisations. A mapping exercise that focuses solely on identifying the name, location and main services of as many RTOs around the country as possible is thus recommended. (4) The DBE HR Task team should explore the possibilities of credentialing as an avenue of recognition for programmes that are not currently accredited. (5) Current information on parent training programmes should be explored to understand areas that warrant future research in this growing area of interest. (6) To explore the effectiveness and feasibility of blended and online programmes, research should be conducted on the practical support implications of these formats, as well as trainees' access to these offerings (including digital literacy).

[4] Biersteker, L., Kvalsvig, J., Zastrau, E. & Carnegie, T. (2023 - *forthcoming*). Deep Dive Quality Study Draft. Department of Basic Education.

[5] Henry, J. & Giese, S. (2023 - *forthcoming*). The Early Learning Positive Deviance Initiative - Summary Report of Quantitative and Qualitative findings. Cape Town, DataDrive 2030.

[6] Umalusi. (2021). Practitioners' perceptions and understanding of the approaches underpinning curriculum and pedagogy in an early childhood classroom. Pretoria. https://www.umalusi.org.za/wp-content/uploads/2021/09/Umalusi-ECD-Study-Final-Edited.pdf

1. BACKGROUND TO THE SURVEY

The National Development Plan 2030[7] which sets out the country's strategic plan and vision for 2030, promotes early childhood development (ECD) services as an education sector priority. To realise this, the plan provided for a policy and programme shift in which the Department of Basic Education (DBE) takes the core responsibility for the provision and monitoring of ECD services. This shift became effective in April 2022 and provides a significant opportunity to improve ECD service provision. The National Integrated ECD Policy (2015)[8] specifies a comprehensive holistic service package for young children. This includes health, nutrition, social security and protection, parenting and family support and early learning opportunities. The goal for early learning, which aligns with Sustainable Development Goal 4.2 is:

> *By 2030, to provide a universally available comprehensive quality age and developmental stage appropriate opportunities for learning for all children from birth until they enter formal school, which lay the foundations for optimal early learning, inclusion and the socio-emotional, physical, intellectual and language development of young children through play and other related, recognised methods for early learning, as well as safe daily care in the absence of their parents and/or primary caregivers (p 59).*

Results of the national Thrive by Five Index study in 2021[9] found that only 46% of children 50 – 59 months old attending early learning programmes (ELPs) are developmentally on track for early learning (for the beginning of Grade R). A third were not emotionally ready for school and 27% did not show adequate social skills. To improve these outcomes, there is a need to ensure that ELPs are of sufficient quality to improve learning and social and emotional outcomes. This will involve increasing access to staff qualifications and skills training, as well as ongoing support for ECD staff. The extent of the challenge was identified in the 2021 ECD Census which found that only 52% of ECD practitioners have an ECD qualification at NQF level 4 – 9, and 27% had undergone a relevant skills programme, meaning that 22% had no relevant qualification.

The DBE, in partnership with Ilifa Labantwana, is developing a Quality Assurance and Support System (QASS) to address continuous quality improvement in ELPs.[10] This will require a range of support and training initiatives and draw on a variety of ECD training and support providers. The DBE has drafted a

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[7] Republic of South Africa. (2012). Our Future Make It Work. National Development Plan 2030. Pretoria.
[8] Republic of South Africa. (2015). The National Integrated ECD Policy. Pretoria.
[9] Giese, S., Dawes, A., Tredoux, C., Mattes, F., Bridgman, G., van der Berg, S., Schenk, J. & Kotzé, J. (2022). Thrive by Five Index Report. Revised August 2022. Innovation Edge, Cape Town. www.thrivebyfive.co.za
[10] Department of Social Development. (2022). Draft Quality Assurance and Support System. Cape Town, Ilifa Labantwana.

[Human Resource Development Strategy for Early Childhood Development](#), and in addition, it is in the process of developing a Human Resource Development Plan for the ECD Sector.

The ECD training and qualifications environment includes prominent ECD training providers who have formed the basis of the ECD non-profit sector, as well as public TVET colleges and many private for-profit training services. There is thus a need for recent data to understand the potential providers of training and support services by scale, location and type of service - as the last surveys were undertaken in 2012 (ECD NGOs)[11]and 2013 (public TVET colleges)[12].

1.1.   Purpose of the survey

This survey assesses the current state of resource and training organisations (RTOs) that support ECD programmes across South Africa and provides a high-level overview of the ECD training provided by public TVET colleges.

There are two main research objectives and associated research questions:

1) To survey a national database of RTOs on various issues relating to their service provision. Specifically:
- What is the existing scale of resource and training provision in South Africa's ECD sector?
- What gaps in skills and resources are currently present among RTOs in the ECD sector?
2) To investigate the scale of ECD qualification development in a sample of TVET colleges across South Africa, including:
- What opportunities currently exist for ECD qualification development in TVET colleges across South Africa?
- What is the relative scale of college-provided skill provision versus RTO-provided provision?

The project is an initiative of DGMT Umncedi, with support from the National ECD Alliance (NECDA) and the ECD Directorate, DBE. There are four groups of primary users that will use the findings.

1. DGMT Umncedi, to identify skill and resource gaps in RTOs which will in turn inform the DBE's Human Resource Development Plan for ECD.
2. NECDA. to advocate the Quality Council for Trades and Occupations (QCTO) and Sector Education Training Authority (SETA)for recognition and support for the resource and training sector.
3. The RTO sector itself, to illustrate the collective size and capacity of the sector, and its power to mobilise and advocate on its own behalf.

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[11] Biersteker, L. & Picken, P. (2013). Report on a Survey of Non-Profit Organisations Providing Training for ECD Programmes and Services (birth to four years). Cape Town, Ilifa Labantwana.
[12] Murray, C. & Biersteker, L. (2014.) TVET Colleges: Contributions towards HR Development in the Early Childhood Development Sector. Claremont, Ilifa Labantwana.

4. The RTO database will be made available for sharing with ECD practitioners and principals so that they are aware of the support available to them in their local areas.

Secondary users of the research findings include the local and international ECD funders who may wish to partner with local RTOs, as well as the DBE to inform the development and implementation of the QASS and Human Resource Development Strategy.

1.2.   Scope

The RTO survey focuses on non-profit ECD organisations offering accredited or non-accredited training. The training could be offered to centre or non-centre based ECD practitioners and parents, and focuses on non-profit organisations (NPOs) training and implementing services for children birth to four years and their primary carers. Training for Grade R practitioners/educators is excluded.

A shorter desktop review of ECD qualifications offered at public TVET colleges is included as they are the providers of choice for publicly funded ECD training. There are a large number of private for-profit providers accredited to offer different ECD related qualifications, but these have not been included in this study, which focuses on state-subsidised training and support services for ECD programmes.

2. SURVEY METHOD

2.1. Constructing the survey sample

A list of potential NPOs was generated from the databases below, from contact with established regional providers, our own networks, and in discussion at different ECD-related meetings. In addition, when surveyed, respondents were requested to identify other ECD NPOs not on provincial lists sent to them. The main databases consulted included:

- NECDA membership list (2022 and 2023)
- Western Cape DSD ECD Provider Database
- Real Reform for ECD Campaign Partners

Together, these lists created the initial sampling frame of 139 organisations. Criteria for inclusion included: (1) the organisation was a non-profit and (2) it offers training of some kind for the ECD sector, with a focus on early learning. From the limited additional organisations identified by survey respondents, it appears that the RTO providers originally identified comprise the majority of RTOs currently active in the ECD sector.

From the original sample frame, approximately ten organisations could not be contacted as their details could not be found. Three organisations had seemingly closed down, and two had stopped training. We estimate that another twelve organisations did not respond as they do not currently offer any training programmes.

2.2. Design and administration of survey

For comparability, the questionnaire was based on the 2012 instrument, shortened and adapted for current regulatory and course developments. Once approved by NECDA, the DBE and Umncedi, it was converted into a Google Form and emailed to the database with a cover letter of support from the ECD Directorate at the DBE, explaining the purpose of the survey and requesting participation..

Three in-person meetings were organised in partnership with NECDA to support survey completion in Gauteng, the Western Cape and KwaZulu-Natal. A fourth meeting in the Eastern Cape was canceled due to limited interest. In total, ten organisations were supported with in-person survey completion.

A modest incentive in the form of a R250 Takealot voucher was provided as an acknowledgement of every completed survey submitted.

Once the initial response period had elapsed, the research team and Umncedi embarked on a series of telephonic and email reminders, and made a concerted effort to secure a high return rate. The 80% response rate was encouraging. The final breakdown was as follows:

Table 1. Survey sample.

Outcome	Number of Providers
Final list of ECD NPOs	139
Could not be contacted, not relevant (not direct service providers), or closed down	± 27
Questionnaires completed	90
Final sample[13]	79

2.3. Desktop scan of TVET offerings

Information was requested from the QCTO, ETDP SETA and the Department of Higher Education and Training (DHET) on the following:

- Lists of providers accredited to offer registered qualifications.
- Expiry and replacements for historic qualifications, with phase out dates.
- Public TVET colleges offering ECD-related qualifications.
- Publicly-funded learnerships since 2022.
- The ETDP SETA Recognition of Prior Learning in ECD project.

Some further data on provincial DBE learnerships was sourced from recent provincial DBE annual reports (2021) and presentations (June 2022).

2.4. Analysis

Google Form responses were converted into an Excel spreadsheet. Descriptive analysis was undertaken for this report using IBM SPSS and Excel. Where responses appeared to be very unlikely or incorrect, they were verified with the respondents. If we could not verify the information, it was removed.

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[13] 11 responses were removed from the final sample as these organisations were private/for-profit providers only (n = 9), or do not offer training (n = 2).

Information from the QCTO and ETDP SETA provider accreditation databases was compared with accreditation information shared by survey respondents. Where there were anomalies, these were checked.

2.5. Limitations

The following limitations of the survey study should be noted:

- The length and complexity of the questionnaire may have deterred participation or caused fatigue during completion.
- As the survey relies on complete self-report, it is vulnerable to social desirability bias. There is a possibility that some respondents presented their work in a seemingly favourable light. It also appears from responses that a few questions were misunderstood, or answers may not have been known – for example on checking about accreditation status, some providers were incorrect about their accrediting body.
- It was not possible, using survey methodology, to gauge the quality of delivery. To some extent this depends on staff qualifications, accreditation status and intensity of inputs but these do not guarantee service quality.
- Data on public TVET offerings was not current as the database was last updated for 2021.

2. FINDINGS

2.1. Sample

Statistics South Africa's 2016 General Household Survey[14] estimated a total of 6,9 million children aged 0 – 5 years. The largest numbers of children within this age group were recorded in KwaZulu-Natal and Gauteng. According to the 2021 ECD Census[15], these two provinces also have the highest numbers of ELPs.

The highest provincial representation (in terms of base province) in the survey sample is the Western Cape (see Table 2 overleaf). This was true of the 2012 RTO survey as well, and is also reflective of trends in the sector. According to the NECDA membership map - the Western Cape and Gauteng have the highest numbers of ECD NPOs (registered as NECDA members). The relatively low survey response rate[16] from Gauteng NPOs is thus surprising. There has, however, been an expansion in the number of ECD NPOs operating in KwaZulu-Natal since 2012.

Many of the organisations provide training outside of their base province (see Figure 1). Just over half of the sample has trained in the Western Cape, while the province with the least training is the North West. No organisations based in the North West responded to the survey[17].

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[14] Statistics South Africa. (2016). Education Series Volume IV: Early Childhood Development in South Africa, 2016. http://www.statssa.gov.za/publications/92-01-04/92-01-042016.pdf

[15] Department of Basic Education. (2022). ECD Census 2021: Report. Department of Basic Education. https://datadrive2030.co.za/wp-content/uploads/2022/09/ecdc-2021-report.pdf

[16] Approximately 30 organisations based in Gauteng were invited to complete the survey.

[17] Only two North West organisations were initially identified, one has not recently done any training and outsources to a partner, and the other smaller organisation did not respond.

Table 2. Base Province of NPO respondents.

Base Province	Child Population 0 – 6 years Estimates[14]	Number of Early Learning Programmes (ELPs)[15]	Percentage of Children On Track for Early Learning[18]	Number of NPO Respondents	Number and % of Respondents Accredited with ETDP SETA/QCTO (per province)[19]
Eastern Cape	979 000	5 426	38.1	8	4 (50%)
Free State	340 000	2 076	31.8	4	3 (75%)
Gauteng	1 429 000	10 376	50.6	12	7 (58%)
KwaZulu-Natal	1 530 000	8 089	29.5	18	11 (61%)[20]
Limpopo	884 000	5 368	44.7	3	3 (100%)
Mpumalanga	608 000	2 954	63.3	2	2 (100%)
North West	522 000	2 494	44.5	0	0
Northern Cape	161 000	925	37.2	1	1 (100%)
Western Cape	738 000	4 715	64.8	31	8 (26%)
Total	**7 191 000**	**42,420**	**43**	**79**	**39 (49%)**

Figure 1. Provinces in which NPO respondents have trained between 2022 and 2023.

- Western Cape: 51%; 40
- KwaZulu-Natal: 42%; 33
- Eastern Cape: 37%; 29
- Gauteng: 30%; 24
- Online (national): 23%; 18
- Mpumalanga: 23%; 18
- Free State: 20%; 16
- Limpopo: 19%; 15
- Northern Cape: 15%; 12
- North West: 13%; 10
- Outside of South Africa: 8%; 6
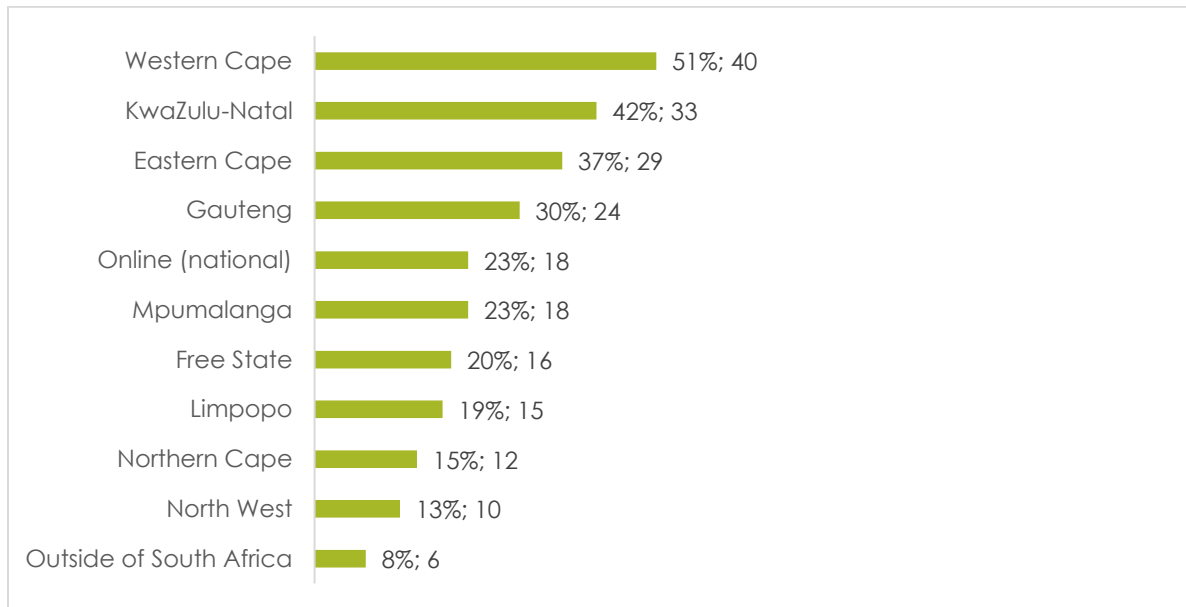
As can be seen in Figure 2, the most common service offered by the sample is early learning resourcing (offered by 89% of organisations), followed by non-accredited training. Child health services is the least

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[18] Giese, S., Dawes, A., Tredoux, C., Mattes, F., Bridgman, G., van der Berg, S., Schenk, J. & Kotzé, J. (2022). Thrive by Five Index Report: Revised August 2022. Innovation Edge. https://thrivebyfive.co.za/wp-content/uploads/2022/11/Thrive-by-Five-Index-report-Revised-August-2022-FINAL-1.pdf
[19] Organisations' accreditation status was verified by checking ETDP SETA and QCTO databases.
[20] One organisation is accredited for a skills programme only (not a full qualification).

offered service, most likely due to the sample strategy which targeted early learning support. Almost all respondents' (95%) primary beneficiaries are unqualified early learning practitioners (

Figure 3), while 76% also work with accredited practitioners. Many organisations in the sample (60%) offer services directly to children.

Figure 2. Main services offered by NPO respondents.

Service	Value
Early learning resourcing	89%; 70
Non-accredited training	86%; 68
Mentorship/supervision	75%; 59
Parent support	71%; 56
Accredited training	62%; 49
Compliance and registration support	54%; 43
Nutrition/feeding	43%; 34
Infrastructure support	38%; 30
Child health services	16%; 13
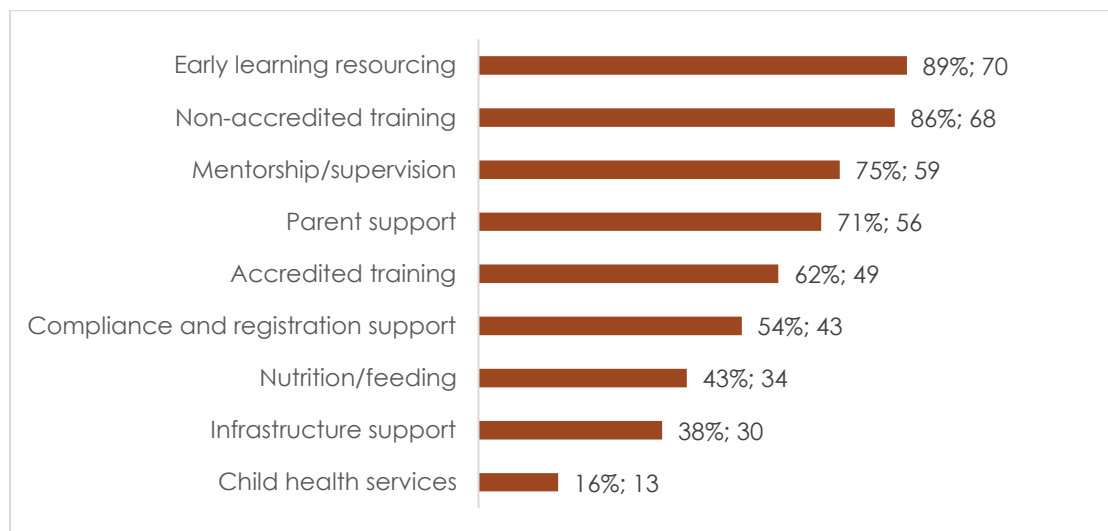
Figure 3. Type of beneficiaries that NPO respondents work with.

Beneficiary	Value
Non-accredited early learning practitioners	95%; 74
Accredited early learning practitioners	76%; 59
Parents	72%; 56
Daymothers/informal caregivers	68%; 53
Supervisors/principals/matrons	63%; 49
Children	60%; 47
ECD organisations	1%; 1
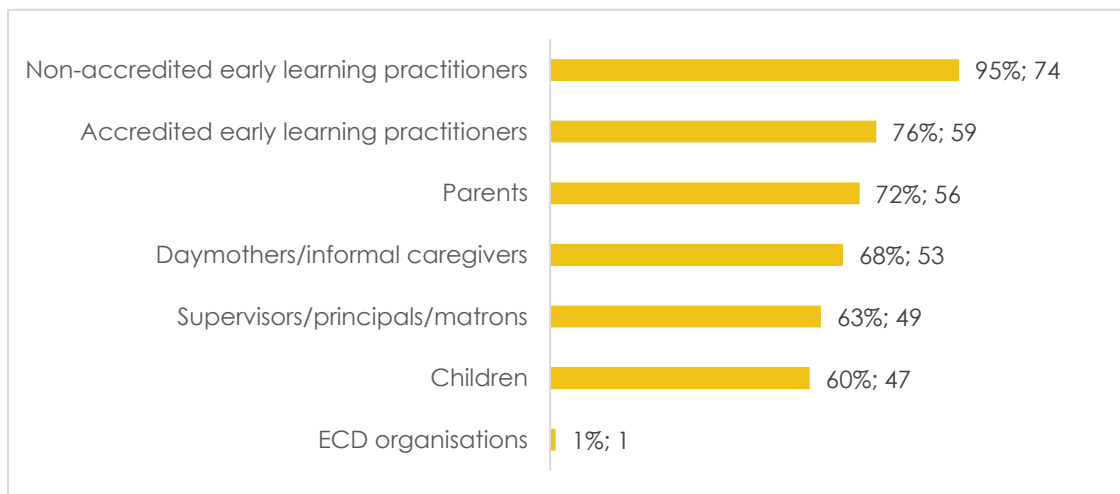
With regard to training, just over half of the sample (56%) deliver training to practitioners who are both in-service and pre-service (Figure 4). Only 2 organisations work only with pre-service trainees.

In Figure 5, we see that 37% of the sample have no training-related partnerships, whereas 32% have reciprocal relationships (respondents deliver their partners' programmes, as well as contracting their partners to deliver the respondents' own programmes). In addition, 10% of the respondents rely on partners to deliver training programmes to the ELPs that they support.

Figure 4. Respondents' primary training target groups.

- Both in-service & pre-service trainees
- In-service trainees (already working in the sector)
- Parents
- Pre-service trainees (not yet working in the sector)
- ECD organisations
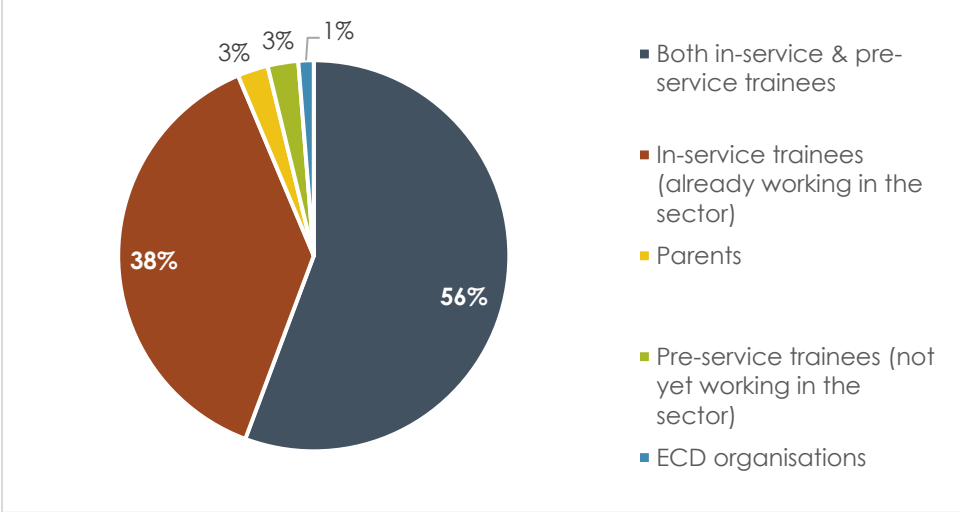
Figure 5. Percentage of respondents who work with partners to deliver training.

- Both partners and respondents deliver each other's training
- No training partnerships
- Partners' deliver training on respondents' behalf
- Delivers training on partners' behalf
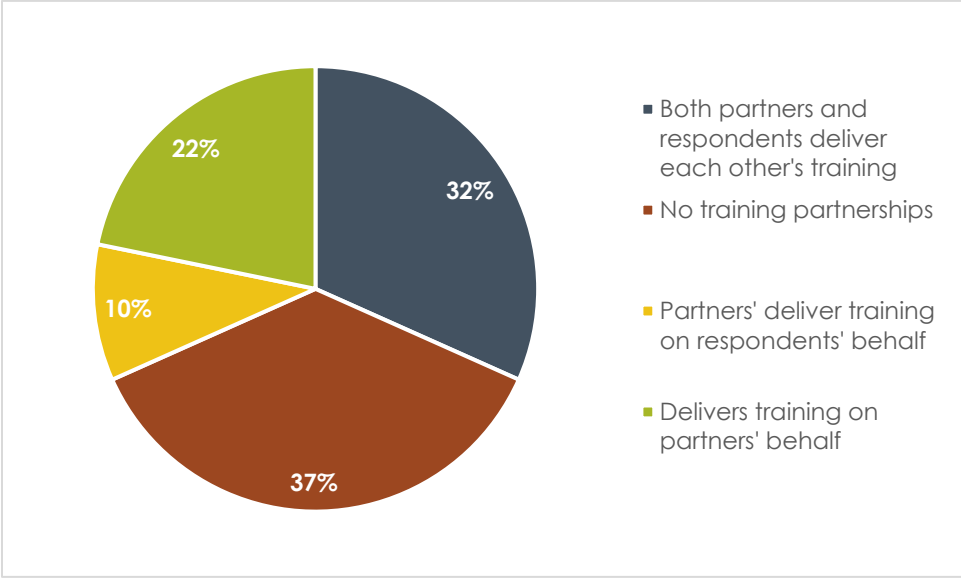
2.2.   Legal structures and governance

The largest number of respondents' organisations were established between 2000 and 2010 (Figure 6), with almost twice the number of organisations founded in this decade as that of the one before or after.

Almost all respondents are registered as an NPO, while many are registered under several other categories as well, including Public Benefit Organisation (PBO), charitable trust, and non-profit company (Figure 7).

Figure 6. Number of NPOs established per year/decade.
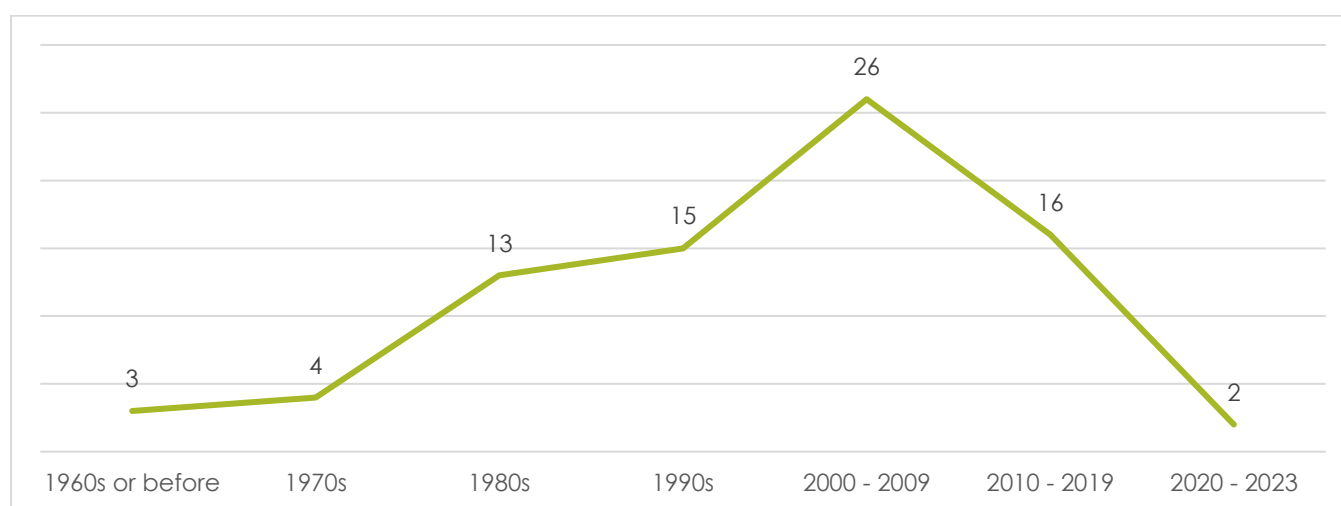
Figure 7. Number and % of NPO respondents per type of organisational registration.
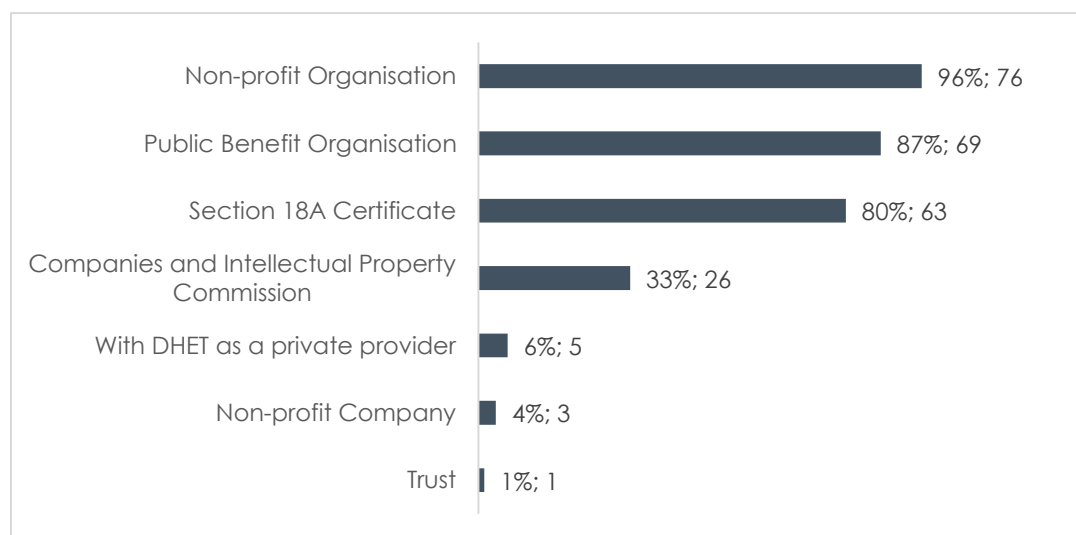
2.3. Accredited learning programmes

2.3.1. A note on ECD qualifications

The South African Qualifications Authority (SAQA) is the oversight body for the National Qualifications Framework (NQF) which is a formalised system of recording the credits assigned to each level of learning achievement, to ensure that skills and knowledge are recognised throughout the country.

The following SAQA accredited ECD qualifications are commonly offered by RTOs and TVET colleges:

- National Senior Certificate Vocational: Education and Development (NQF level 2, 3 and 4) is offered by TVET colleges over three years as a national senior certificate and equips learners to be ECD assistants.
- Further Education and Training Certificate (FETC): ECD ID 58751 (NQF level 4)[21] is offered by RTOs, private providers and Public TVET colleges for ECD practitioners. It expired on 30 June 2023, closes for enrolment on 30 June 2024 and will not be renewed.
- Occupational Certificate: ECD Practitioner ID 97542 (NQF level 4) replaces the FETC and while it is due for review, it has been registered.
- Higher Certificate ECD ID 23117 (NQF level 5; 120 credits) expired on 30 June 2023 and will not be renewed.
- Diploma ECD ID 23118 (NQF level 5; 240 credits) expired on 30 June 2023 and will not be renewed.
- 191 N4 – 6 Educare is the most widely offered public TVET college ECD course and is also offered by some private FET colleges registered with DHET (but not RTOs). This course is also phasing out over the next three years and will be fully phased out by January 2026.[22] The National Accredited Technical Education Diploma (NATED) N4-6 is equal to a NQF level 5, but with 18 months of work experience it is equivalent to an NQF level 6 (or the NATED National Diploma). At public colleges, this is DHET subsidised.
- TVET colleges also offer the General Education and Training Certificate ID73254 (NQF level 1) which offers an ECD vocational specialization. This also expired on 30 June 2023.

The new Higher Certificate in Early Childhood Care and Education (ECCE),NQF level 5, and the Diploma ECCE (NQF level 6), both in the Higher Education and Training Sub-framework, addresses the learning programme. A Higher Occupational Certificate: Early Child Development Centre Manager (NQF level

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[21] NQF level 4 is the level of training currently expected for principals in Early Learning Programmes for full ECD Programme registration.
[22] TVET Numbered Circular 0095 (18 April 2023)

5) has been scoped but not yet registered. Prior to lockdown, an Occupational Certificate at level 3 was scoped. This is to be reviewed by the ETDP SETA with a view to possible registration as a part of a full qualification. Its purpose would be to bridge practitioners with lower educational levels into the NQF level 4 Occupational Certificate. In addition, an NQF level 1 Occupational Certificate for ECD Assistants is currently being scoped.

At present there are far more providers, including public, private and NPO-accredited, for the historic and recently deregistered ECD qualifications (58751, 23117 and 23118) than the Occupational Certificate: ECD Practitioner. The Higher Education Institutions (HEI) level 5 Higher Certificate (ID 104532) and Diploma are phasing in but are not widely offered as yet.[23]

Table 3 provides information on the registered providers per ECD qualification. The fact that providers are accredited does not mean that they are currently offering the qualification, and some of them on the existing databases may no longer be operating. While there may be some misallocations, the general trend is clear.

Table 3. Number of registered providers per qualification.

Qualification		Registered Providers			
		Total	*Private*	*RTOs*	*Public TVETS*
NQF level 4	58751 (Historic)	613	532	57	24
	97542	25 [1]	13	7(+3)	5
NQF level 5	23117 (Historic)	154	116	20	18
	23118 (Historic)	230	205	16	19

Sources: ETDP SETA provided a current list of accredited providers for the Historic Qualifications and the QCTO database is the source of Occupational Certificate (97542) information.

[1]Note: We are aware that the QCTO database has not been recently updated and this is an undercount. The additional 3 were RTOs we checked with as they are offering the qualification.

2.3.2.   Accredited training offered

Table 4 displays the number of respondents offering accredited training programmes per province. A similar number of respondents are currently offering the FETC as were in 2012 (31 compared with 32). There is an increase in those offering the Higher Certificate (13 up from 9 in 2012), as well as the Diploma (11 compared with 7 in 2012).

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[23] According to PIECCE (accessible at https://www.saide.org.za/article.php?id=49) the University of the Western Cape will offer the Higher Certificate. CPUT, UFS, UNISA, UFH will offer the Diploma.

Note that the same programme IDs specified in the table below apply across all sections of the report that follow.

Table 4. Accredited training programmes offered by N respondents per province.

Province	NQF level 4 programmes		NQF level 5 programmes	
	Occupational Certificate: Early Childhood Development Practitioner (ID 97542)	FETC: ECD (ID 58761)	Higher Certificate: ECD (ID 23117/ 64649)	Diploma: ECD (ID 23118/ 64650)
Eastern Cape	3	5	1	4
Free State	1	3	0	0
Gauteng	3	3	1	1
KwaZulu-Natal	1	7	3	2
Limpopo	0	3	1	0
Mpumalanga	0	2	1	1
North West				
Northern Cape	0	1	1	0
Western Cape	0	7	5	3
Total	*8*	*31*	*13*	*11*

2.3.3.   Enrolments in accredited programmes

Figure 8 provides the total accredited programme enrolments in 2022 and those currently completed. Completion levels hover around 55% across programmes. This may be because programmes do not always span a calendar year and might still have been ongoing around the time of the survey (see Table 6).

Attrition rates for accredited programmes were low across programmes according to the respondents (Table 5).

It is probable that lower enrolments in the historic qualifications for 2023, compared to 2022, (Figure 9) are at least partially due to intake dates scheduled after the survey period. Since 2012, there has been a clear increase in enrolments in the level 5 Higher Certificate and Diploma qualifications; in the period 2010 – 2012, there were 707 enrolments for the Higher Certificate and 660 for the Diploma (compared to 650 and 651 respectively, for 2022).

Figure 8. Total enrolments in accredited programmes (bars) and percent completed (lines) - 2022.
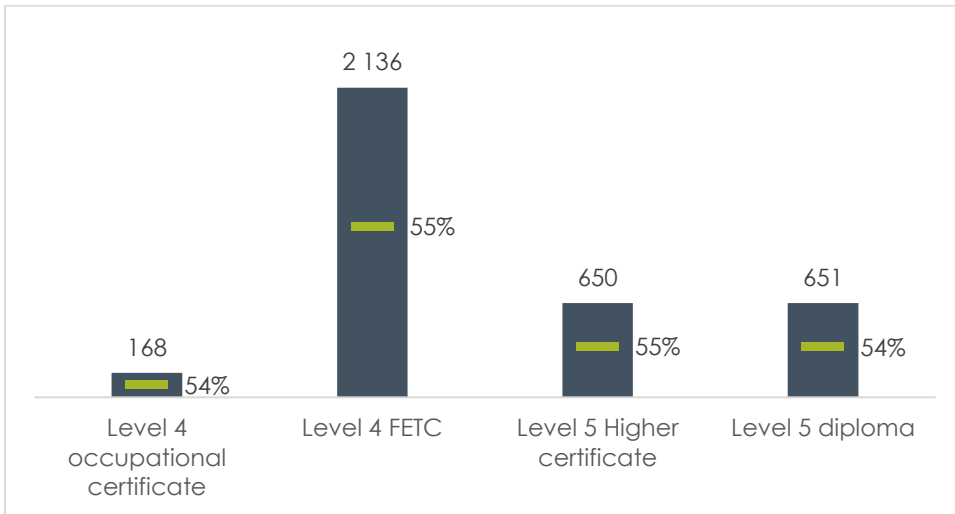
Table 5. Attrition rates per programme.

Level 4 occupational certificate	Level 4 FETC	Level 5 Higher certificate	Level 5 diploma
6%	8%	4%	2%

Figure 9. Total enrolments in accredited programmes – 2022 vs 2023.
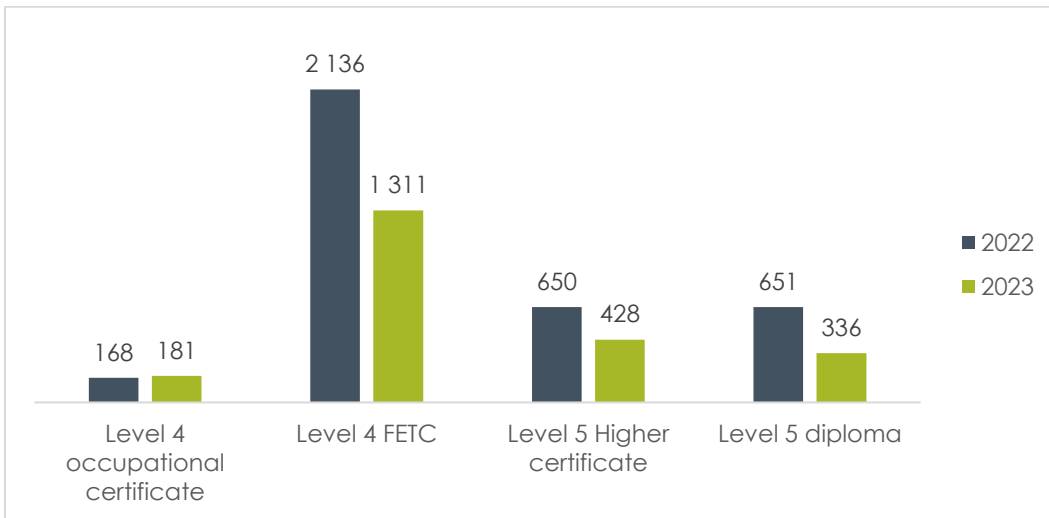
3.3.4. Delivery of qualifications

Tables 6 and 7 display the number of respondents for each aspect of training delivery. The ID numbers for each programme are displayed previously in Table 4. Most respondents report their accredited programmes being 12 - 20 months in duration, while days of contact time varies per programme.

Importantly, a number of respondents report that their programmes are under a year in duration. This is surprising and would need investigation to determine whether they meet all the course requirements in this period.

Table 6. Duration of training for accredited qualifications (number of respondents).

Number of Months	Level 4 Occupational Certificate	Level 4 FETC	Level 5 Higher Certificate	Level 5 Diploma
8 - 11 months	1	3	2	2
12 - 20 months	11	25	8	4
24 months	1	3	2	4
36 months	1	0	1	1
Median	18 months	18 months	18 months	18 months

Table 7. Days of contact time for accredited qualifications training.

Number of Days	Level 4 Occupational Certificate	Level 4 FETC	Level 5 Higher Certificate	Level 5 Diploma
Under 60	3	10	7	7
60 – 80	7	10	3	1
81 – 100	2	8	2	2
101 – 120	1	3	0	2
Over 120	0		1	1
Median	60 days	68 days	50 days	60 days

Figure 10 and Figure 11 indicate a substantial practical element to the qualifications training, as well as a high number of on-site visits post-training. While the survey did not include details of the type of post-training support, this usually entails a visit to the site with observation and feedback to staff.

Figure 10. Average number of on-site practical days per accredited programme.

Programme	Days
Level 5 Diploma	99
Level 5 Higher certificate	130
Level 4 FETC	113
Level 4 Occupational certificate	46
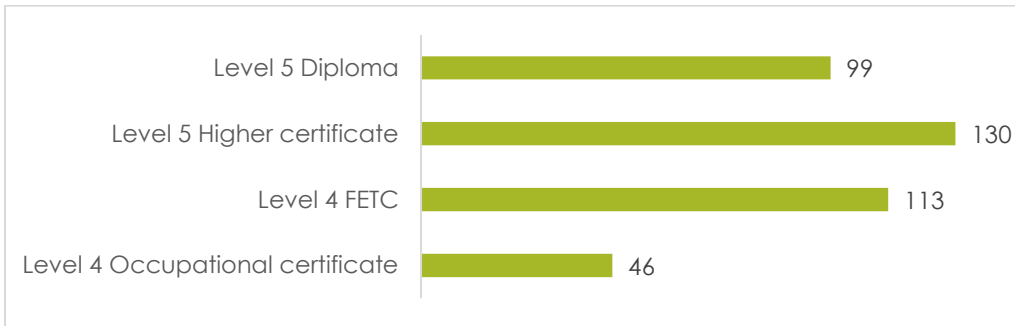
Figure 11. Average number of post-training site visits per accredited programme.

Programme	Visits
Level 5 Diploma	5
Level 5 Higher certificate	4
Level 4 FETC	4
Level 4 Occupational certificate	4
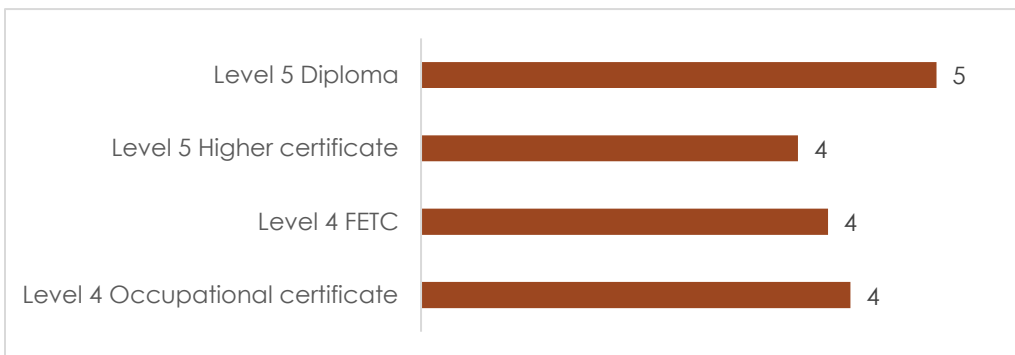
Programme delivery via modules (blocks of days) is the most common format, but the number of blended (face-to-face and online) programmes is quite substantial – possibly as a result of COVID-era programming (Figure 12).

Figure 12. Number of respondents per type of delivery format of accredited programmes.

Programme	Modules	Weekly sessions	Online	Blended
Level 4 Occupational certificate	4	4	1	3
Level 4 FETC	25	8	1	9
Level 5 Higher Certificate	9	3	1	3
Level 5 Diploma	8	2		4
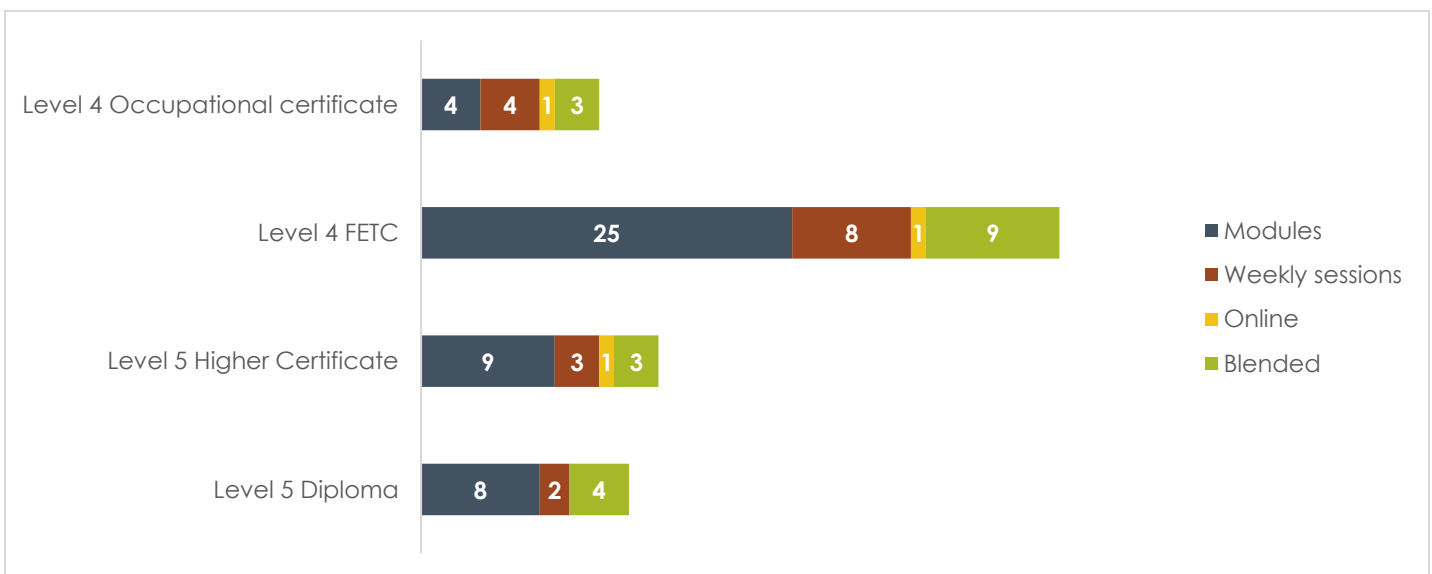
3.3.5. Funding sources and training costs of accredited programmes

The cost of programme delivery to the organisation (per trainee) varies considerably across respondents. For example, the level 5 Higher certificate ranges from R5 600 to R42 000 (Table 6). A total of 17 respondents reported no costs to trainees for their accredited programmes. It is unclear whether this means that the programmes are free of charge, or the respondent did not want to provide this information. Among those who do charge for the accredited programmes (Table 7), the minimum programme cost to the trainee was R3 000 across programmes, while the costliest programme, on average, is the level 5 Diploma.

Table 6. Cost to the organisation for programme delivery (per trainee).

	Number of Respondents	Minimum	Maximum	Mean
Level 4 Occupational certificate	13	R15 340	R50 000	R23 512
Level 4 FETC	28	R9 500	R42 000	R25 658
Level 5 Higher certificate	12	R5 600	R40 000	R24 573
Level 5 Diploma	10	R8 500	R65 000	R28 470

Table 7. Cost to the trainee for programme participation.

	Number of Respondents	Minimum	Maximum	Mean
Level 4 Occupational certificate	13	R3 000	R31 500	R7 665
Level 4 FETC	21	R3 000	R36 010	R8 782
Level 5 Higher certificate	12	R3 000	R27 000	R10 589
Level 5 Diploma	11	R3 000	R53 720	R14 793

The majority of respondents report funding their programmes via donor funding, with the exception of the level 5 Higher Certificate, where more respondents report funding via fees (Figure 13 and Figure 14). Learnerships remain the lowest reported source of funding. A minority of respondents fund their accredited programmes via fees only (Figure 14). The most consistent source of funding for NPOs seems to be donor organisations as indicated in (section 3.9).

Figure 13. Sources of funding per accredited programme (percentage of respondents per source).

Level 4 Occupational certificate
- 8; 53% (Fees)
- 12; 80% (Donor funded)
- 1; 7% (Learnership)

Level 4 FETC
- 17; 55% (Fees)
- 28; 90% (Donor funded)
- 4; 13% (Learnership)

Level 5 Higher certificate
- 9; 69% (Fees)
- 7; 54% (Donor funded)
- 0; 0% (Learnership)

Level 5 Diploma
- 7; 64% (Fees)
- 7; 64% (Donor funded)
- 1; 9% (Learnership)

Legend:
- Fees
- Donor funded
- Learnership
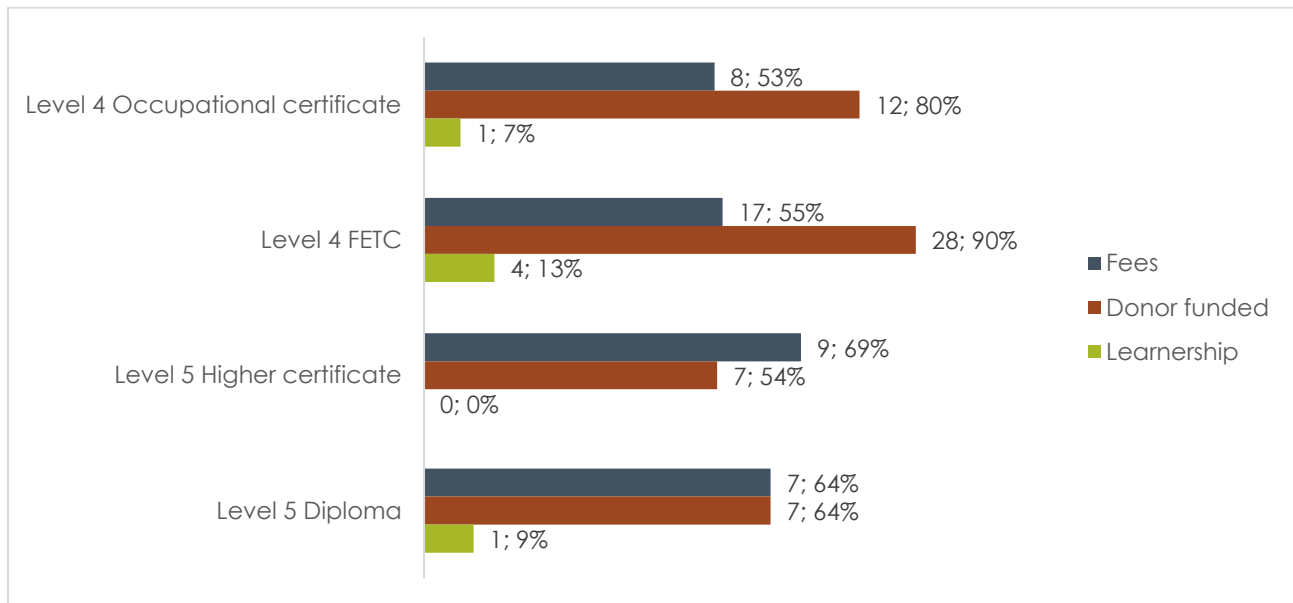
Figure 14. Number and percentage of respondents who source programme funding via fees only.

- Level 5 Diploma: 4; 36%
- Level 5 Higher certificate: 6; 46%
- Level 4 FETC: 3; 10%
- Level 4 Occupational certificate: 3; 20%
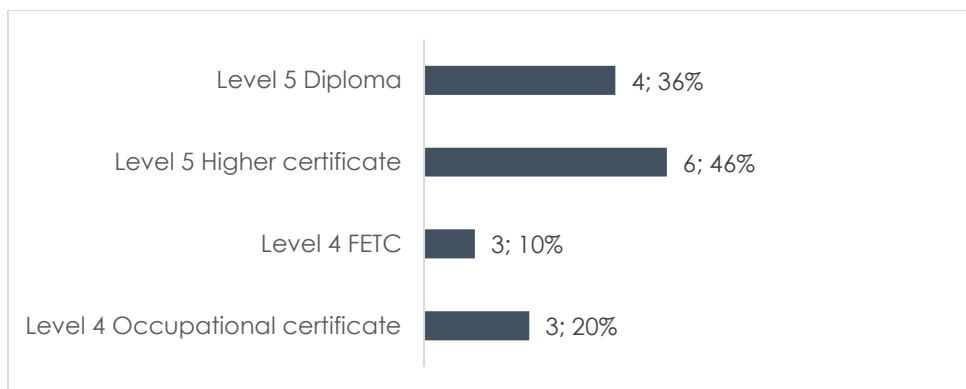
3.3.6. Learning programme/curriculum material

Developing learning programme materials for qualifications, and getting them approved, is very resource intensive. It is therefore generally more efficient to use approved learning programme materials developed by other organisations or networks. In view of the phase-out of all historic qualifications, using existing materials could be a significant factor in increasing the supply of providers to offer the Occupational ECD Practitioner qualification. Ntataise, Khululeka, Cotlands, and NECDA have so far developed Occupational Certificate materials, although Ntataise is still in the accreditation process.

For the level 4 FETC (58751), the most common materials used in the survey sample were developed by: NECDA (n = 5) Ntataise (n = 4), and Klein Karoo Resource Centre (n = 3). Many providers have developed their own materials. Klein Karoo Resource Centre's materials are used by three providers for

the Higher Certificate (23117) and Eduwrite, NECDA and Klein Karoo materials (one each) are used for the Diploma (23118); otherwise in-house materials have been designed.

3.3.7 Learnerships

To understand the possible sources of learnerships, we contacted the ETDP SETA who have some provincial discretionary funds for learnerships, but sources reported that the main source of ECD learnership funding is the Social Sector Expanded Public Works Programme funding, channeled through provincial education departments.

It is DHET policy to preferentially direct publicly funded learnerships through public TVET colleges. Table 17 in Section 4.1 provides information on provincial ETDP SETA learnerships using their discretionary funding. These have been very limited (only for the FETC 58751) and were allocated to public TVET colleges (see section 4.1). Some information on learnerships offered for ECD practitioners (0 – 4 years) was available in provincial DBE presentations and annual reports. While these were also largely directed to public TVET colleges, a private provider was contracted in the Free State. Mpumalanga and Gauteng had the largest numbers of learnerships (200 and 500 respectively for 2021). Their provincial ECD Institutes and partners offered the training.

Only 12 survey respondents (15%) reported offering learnerships, as can be seen in Table 8. These respondents are based in Gauteng, Mpumalanga, KwaZulu-Natal and the Western Cape. In 2012, 15 respondents (20%) offered 27 learnerships. They were based in the Northern Cape, Western Cape, Limpopo, KwaZulu-Natal, Free State and Eastern Cape. Of interest is that 41% of 2012 learnerships were offered in partnership with public TVET colleges.

Table 8. Number of respondents that provide learnerships per province.

Province	Number of Respondents Offering Learnerships	Total Number of Placements	
		2021	2022
Gauteng	1	0	22
Mpumalanga	2	62	210
KwaZulu-Natal	4	339	361
Western Cape	5	115	115
Total	**12**	**516**	**708**

3.3.8. Recognition of Prior Learning (RPL)

Training policy specifies the importance of RPL but it has tended to be difficult to offer as it is resource-intensive, often not funded, and numbers are low.

Only 12 survey respondents formally offer RPL, as can be seen in Table 9. In 2012, a similar number of respondents offered it (10). The ETDP SETA has an RPL project for practitioners seeking accreditation for the FETC 58751 which is operating through TVET colleges (see section 4.2).

Table 9. Number of respondents offering RPL, as well as placement data.

Province	Number of Respondents		Total Number of Placements	
	Offer formally (e.g., for credits)	Offer informally (e.g., for entrance)	2021	2022
Eastern Cape	3	0	0	0
Gauteng	2	1	60	41
KwaZulu-Natal	2	5	67	44
Mpumalanga	1	0	110	110
Northern Cape	1	0	75	25
Western Cape	3	0	10	10
Total	**12**	**6**	**322**	**230**

2.4.   Unit Standards

This section refers to unit standards offered *outside* of a unit standard-based full qualification[24]. They are offered as *part* qualifications, skills programmes or additional electives to enrich learners' practice. Note that data from the North West is not reported as no survey responses were received from organisations based in this province.

2.4.1.   Unit Standards offered

The level 3 Unit Standards are most often offered as part of a FETC full qualification, as opposed to a standalone offering (a total of 19 respondents offer the level 3 Standards as part of a full qualification). The level 2 Standards are part of a skills programme for less qualified practitioners and were intended to replace the phased-out Basic ECD Certificate NQF level 1. In the absence of a current ECD assistant-

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[24] The historic qualifications can be offered based on exit level outcomes for the full qualification, or through accumulating fundamental, core and elective unit standards.

level qualification, they fill an important training gap. Like the other historic qualifications, these were deregistered on 30 June 2023 and the last date for enrolment is 30 June 2024.

Compared to the data from the 2012 survey, there has been a small increase in the number of respondents offering level 2 Unit Standards/electives – highlighting the need for a basic skills programme for practitioners (Table 10). There has been a decline in providers offering the level 3 Unit Standards/electives as standalone courses.

The level 4 Unit Standards in Table 11 below are part of the FETC core and as such, part qualifications are seldom offered.

As can be seen in Table 12, level 5 Unit Standards are currently only offered as standalone programmes by one to two organisations in the survey sample –a substantial decline from 2012. The level 5 management elective 'Manage an ECD Service'(244478) was offered by 6 providers in 2012, a trend that has not continued, although it is very likely offered as an elective for the level 5 historic qualification. In 2012, the Grade R electives (244260, 244257 and 244256) were not offered separately, and neither was the Unit Standard 'Evaluate an ECD Service' (244481). The Grade R electives have since been surpassed by the Diploma in Grade R.

Table 10. Number of survey respondents offering NQF levels 2 and 3 Unit Standards.

	Level 2 Unit Standards			Level 3 Unit Standards	
	Care for babies, toddlers and young children (244255)	Interact with babies, toddlers and young children (244262)	Demonstrate basic understanding of child development (244258)	Prepare resources and set up the environment to support the development of babies, toddlers and young children (244468)	Work with families and communities to support ECD (244462)
Eastern Cape	1	2	2	1	1
Free State	1	1	1	0	0
Gauteng	3	4	4	1	0
KwaZulu-Natal	3	3	2	2	1
Limpopo	3	3	3	0	0
Mpumalanga	1	0	1	0	0
Northern Cape	0	0	0	0	0
Western Cape	1	1	1	1	1
Total 2022	**13**	**14**	**14**	**5**	**3**
Total 2012	**10**	**11**	**8**	**10**	**9**

Table 11. Number of respondents offering NQF level 4 Unit Standards.

	Level 4 Unit Standards				
	Demonstrate knowledge and understanding of the development of babies, toddlers and young children (244484)	Facilitate the holistic development of babies, toddlers and young children (244480)	Observe and report on child development (244475)	Prepare Early Childhood Development programmes with support (244472)	Provide care for babies, toddlers and young children (244469)
Eastern Cape	1	1	1	1	1
Free State	0	0	0	0	0
Gauteng	1	1	1	1	1
KwaZulu-Natal	2	2	1	2	1
Limpopo	0	0	0	0	0
Mpumalanga	0	0	0	0	0
Northern Cape	0	0	0	0	0
Western Cape	1	0	0	0	1
Total	**5**	**4**	**3**	**4**	**4**

Table 12. Number of respondents offering NQF level 5 Unit Standards.

	Level 5 Unit Standards						
	Develop learning programmes to enhance participation of learners with special needs (13643)	Evaluate an ECD Service (244481)	Manage an ECD service (244478)	Facilitate a Life Skills Learning Programme in the Reception Year (244260)	Facilitate a Literacy Learning Programme in the Reception Year (244257)	Facilitate a Numeracy Learning Programme in the Reception Year (244256)	Refer a person with a disability to specialised services (244610)
Eastern Cape	0	0	0	0	0	0	0
Free State	0	0	0	0	0	0	0
Gauteng	1	1	1	1	1	1	1
KwaZulu-Natal	0	0	0	0	0	0	0
Limpopo	0	0	0	0	0	0	0
Mpumalanga	0	0	0	0	0	0	0
Northern Cape	0	0	0	0	0	0	0
Western Cape	0	0	1	0	1	1	0
Total 2022	1	1	2	1	2	2	1
Total 2012	-	31	31	33	33	33	-

3.4.2 Enrolments in unit standards

According to the respondents' enrolment figures (Figure 15 and Figure 16), level 2 Unit Standards saw the greatest enrolment figures in 2022 and 2023 (as at June). Enrolments have increased in 2023 for levels 3 and 4 Unit Standards.

In comparison to 2012 data, a similar number of practitioners were enrolled in 2012 for level 2 Unit Standards compared to 2022 (1 068 and 1 177 practitioners respectively). Far less enrolled in level 3 Unit Standards in 2022, compared to 2012 (230 versus 1 360), however, enrolments have increased in 2023. Comparative data for levels 4 and 5 is not available.

Figure 15. Total enrolments in Unit Standards (bars) vs percent completed (lines) - 2022.

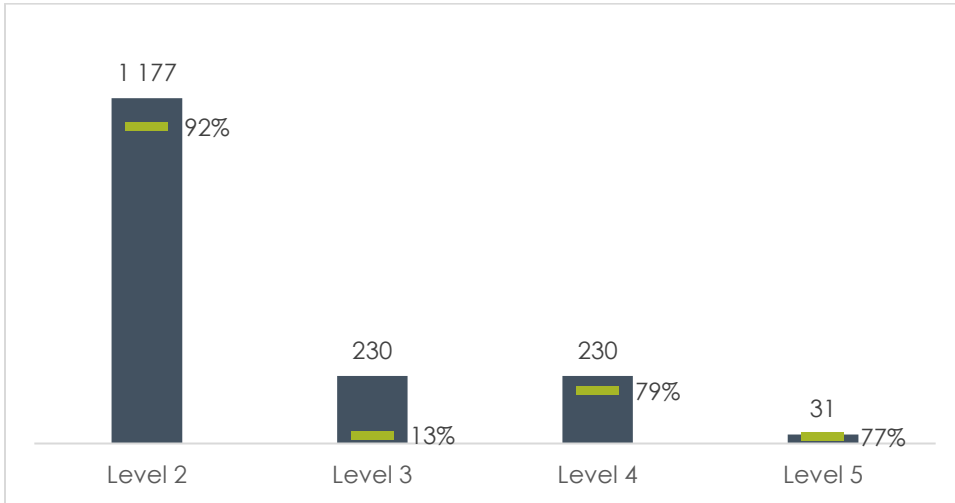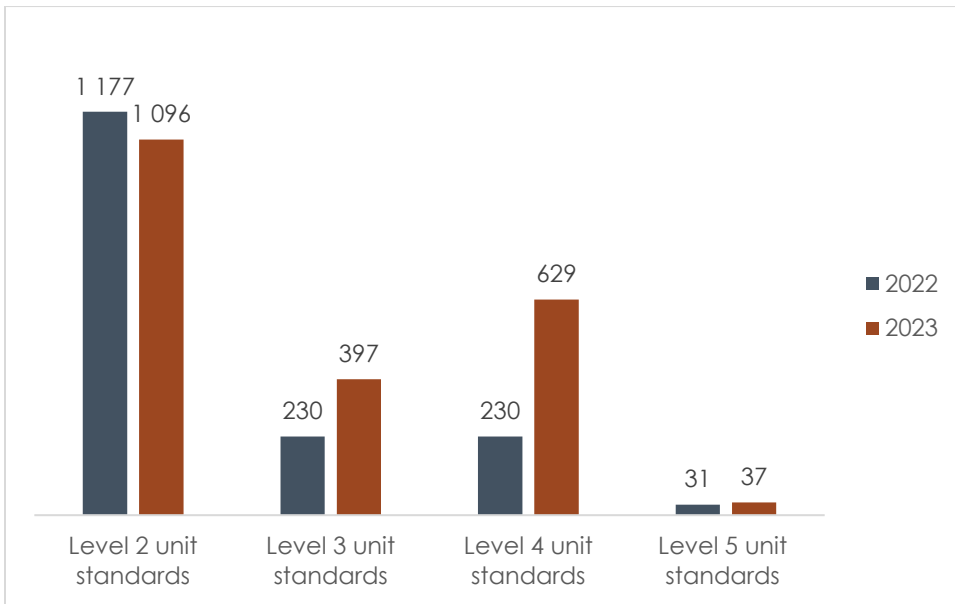Figure 16. Total enrolments in Unit Standards – 2022 vs 2023.

2.4.2. Delivery of Unit Standards

As with the accredited programmes, delivery of the Unit Standards primarily uses modules (blocks of days). Levels 3 and 4 Unit Standards are also commonly delivered using blended approaches (both in-person and online).

Figure 17. Number of respondents per type of delivery format of accredited programmes.
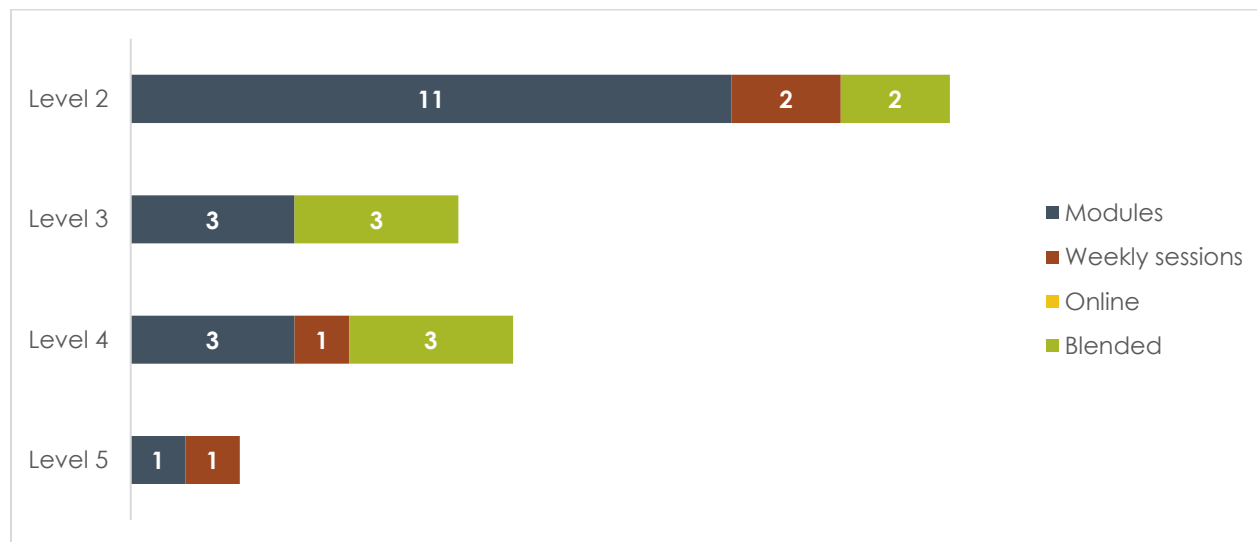
2.5. Non-accredited training programmes

A total of 70 respondents (89% of the survey sample) report offering non-accredited training programmes – 40% of these organisations are based in the Western Cape (Figure 18). A total of 337 programmes are offered by these respondents, with a median of 3 programmes per respondent. Most respondents offer between 1 and 4 programmes, with one offering a total of 70 programmes.

Figure 18. Number of respondents that offer non-accredited training programmes.
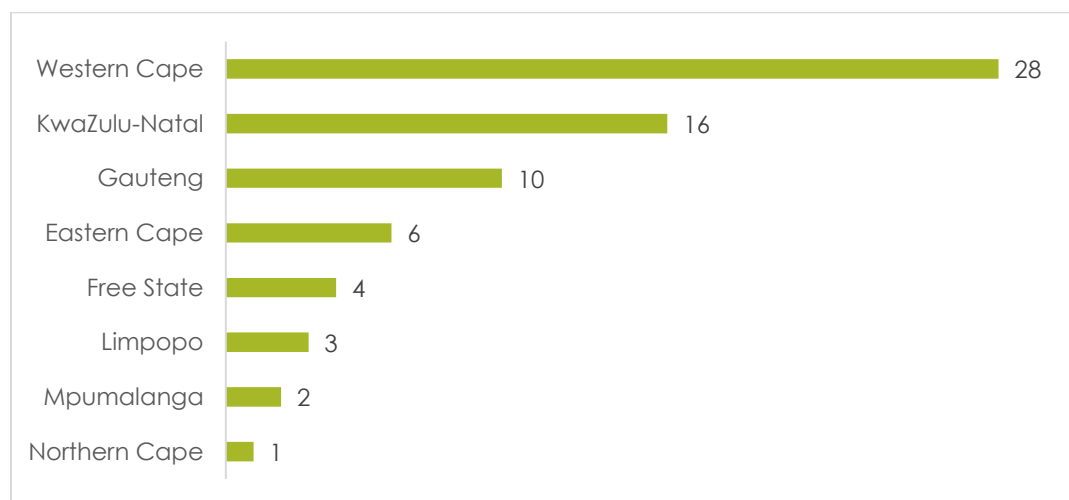
Survey respondents were asked to describe between one and five of their non-accredited programmes. As such, the information that follows is aggregated across a maximum total of five programmes per respondent, however, as mentioned above – the number of programmes per respondent varies.

Where sufficient information on the topics of these programmes was provided, topics were counted and consolidated. The most frequent topics, with four or more respondents noting them, are presented in Figure 19. The most common type of non-accredited programme focuses on practitioner training using some kind of curriculum, developed by the organisation or another RTO; this is followed by programmes that support parents and caregivers.

Figure 19. Number of respondents per most common non-accredited programme topic categories.

Topic	Count
Practitioner/teacher training using curriculum	37
Parent education/support	16
Play-based learning	15
Leadership & centre management	15
Literacy development	13
ECD Foundations/Orientation	9
Toy & resource making	8
Numeracy development	7
Inclusive education & diversity	6
Child health & nutrition awareness	5
Business skills	4
Classroom management & practice	4
WASH	4
Daymother/playgroup training	4
Gender-based violence	4
Socioemotional skills for children	4
Food gardening	4
Cognitive development	4

Other topics with less than four respondents noting them include:

- Child assessment
- Book-sharing
- Committee management
- Toy library training
- Digital literacy training for practitioners
- Coding & STEM
- First 1000 Days
- Family & Community motivators
- HIV/AIDS
- Home-visiting training
- Substance abuse/FAS awareness training
- Creative education (e.g., arts & music)
- Mental health support
- Assistant teacher training
- ECD forum development
- Children's rights
- Cooking
- Experiential learning for children
- Grade R teacher training

The vast majority of the programmes that were described are not endorsed by the South African Council of Educators (SACE). SACE is the body which manages continuous professional training and development (CTPD) for professionals in the education sector, including for early learning practitioners.

Courses can be SACE-endorsed which allows professionals to earn CTPD points towards maintaining their professional registration. SACE endorsement is not linked to SAQA or the NQF and therefore, SACE-endorsed courses do not build towards qualifications. Due to challenges delivering the NQF level 4 Occupational Certificate, several training organisations are opting for SACE registration as an alternative.

While SACE endorsement is not the same as accreditation, it does provide some recognition and value to learning opportunities outside of the qualifications' framework. As a consequence of the ECD function shift, ECD practitioners will be required to register with SACE, and this will increase the attraction of SACE-endorsed short learning programmes. Current work by the Funda Udlale Nathi (F.U.N.) ECD professional standards team[25] to develop and align ECD-specific professional teaching standards for practitioners of children 0 – 4 years will facilitate this process, providing an avenue for RTO providers' services to be recognised. A total of 8 respondents (11%) have accredited one or more of their programmes with SACE.

Most non-accredited programmes target practitioners (Figure 20), and the median duration for programmes is around 22 days (Table 13).

Figure 20. Non-accredited training programme targets (total number of respondents across described programmes).
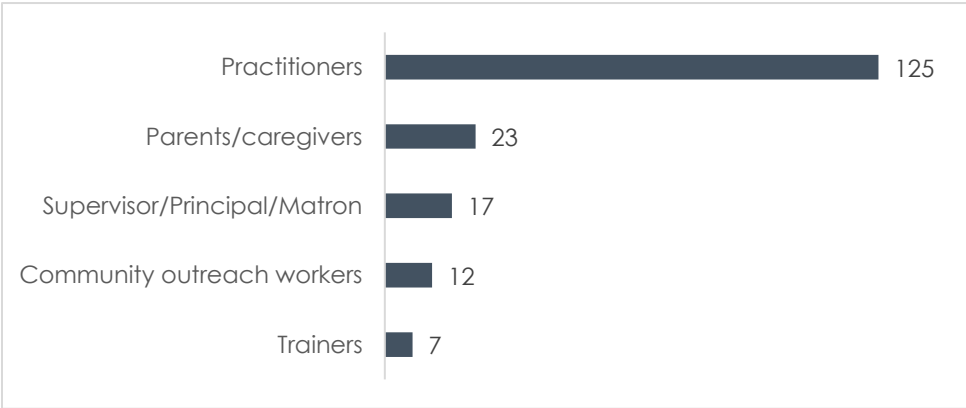
Table 13. Descriptive statistics for all non-accredited programmes - duration and site support offered (in days).

	Minimum	Maximum	Median	Mode
Duration of programmes (in days)	1	365	22	5 (6%)
Number of on-site support offered (in days)	0	372	12	1 (8%)

In 2022, a total of 76,503 trainees were enrolled in the non-accredited programmes described by respondents, while a total of 66,120 trainees had enrolled in 2023 (as of June) (Figure 21). These figures include a variety of trainees (e.g., parents, playgroup facilitators, teaching assistants, principals, etc.) and there is a strong likelihood that some trainees enrolled in more than one non-accredited programme (and have therefore been double-counted). In light of Gauteng's high enrolment numbers, it is important to note that the majority of these enrolments are accounted for by 4 large Gauteng-based organisations.

Most respondents (60%) offer their non-accredited programmes to trainees for free, with many requiring trainees to cover their own transport. Among those who do charge trainees, the minimum cost to trainees for a programme is R150 and the maximum is R50,000.

Figure 21. Enrolment in all respondents' non-accredited programmes – 2022 and 2023.
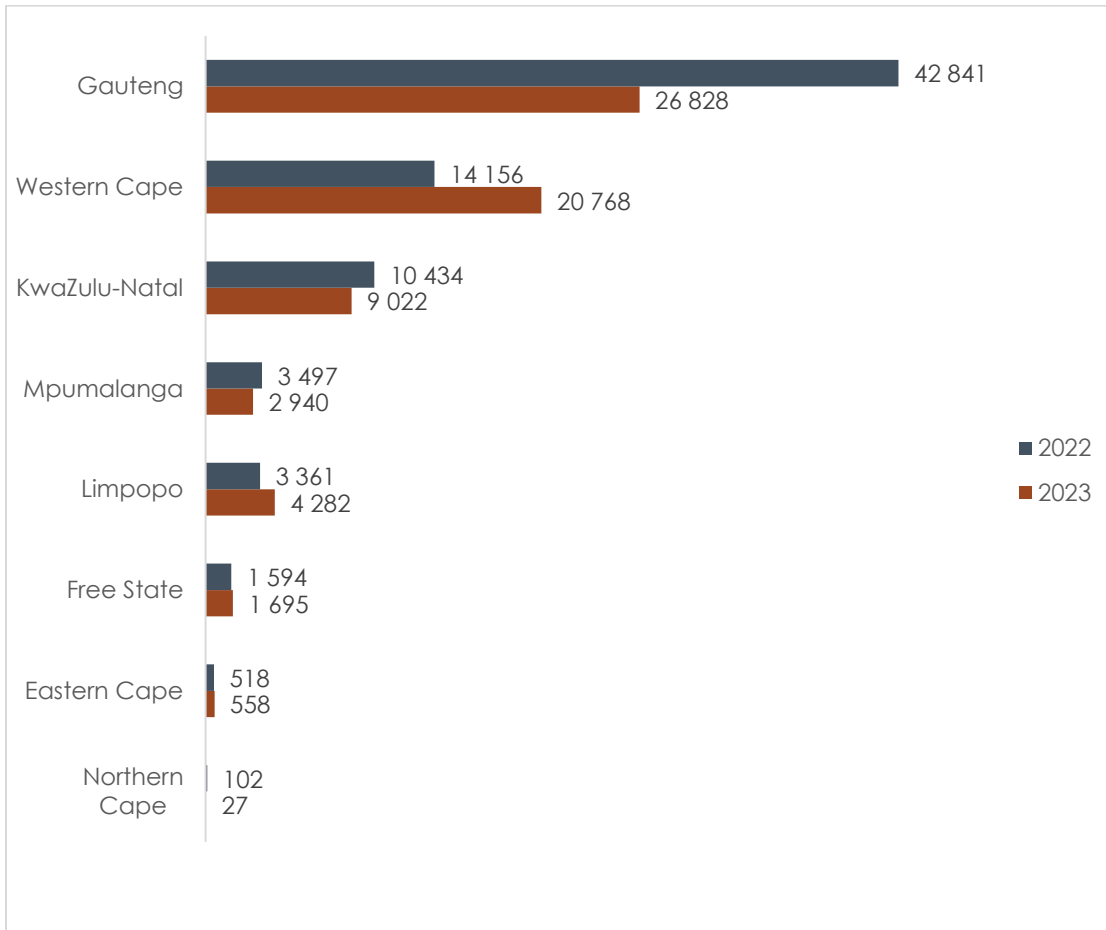
2.6.   Location and profile of trainees

According to the respondents' self-reported data, there were a grand total number of 128 171 enrollments across programmes in 2022. As can be seen in Figure 22, this is a substantial increase since 2012. This number is high relative to the 165 069 practitioners counted in the 2021 ECD Census, most likely due to the inclusion of non-accredited programme enrolments (e.g., parents, teaching assistants, principals, etc.) and the likelihood that some practitioners enrolled in more than one non-accredited programme (and have therefore been double-counted). It is also possible that respondents included enrolment data from other types of training they conduct.

Figure 22. Total number of enrolments per province – 2012 and 2022.
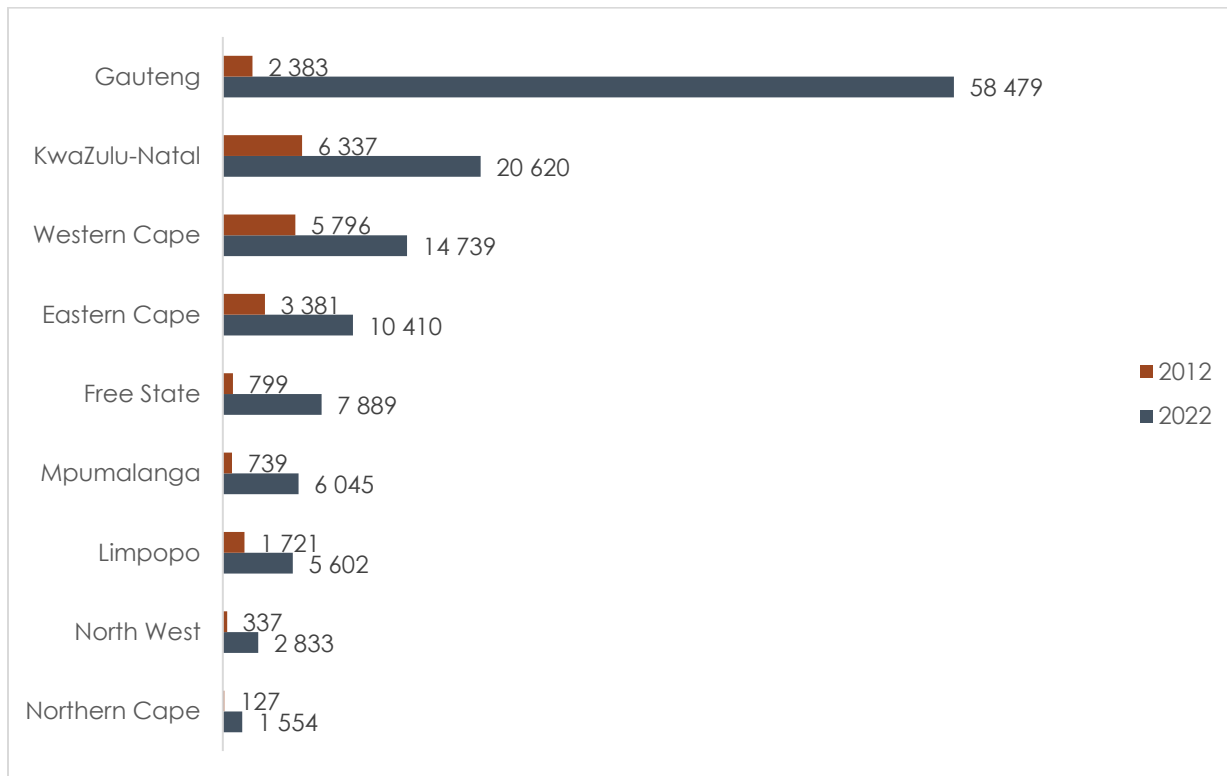
The majority of respondents (88%) report that their trainees are 75-100% female, reflecting the major trends seen in the ECD sector.

Most organisations work with trainees between the ages of 26 and 35 years old (27 organisations; 34% of sample) and 36 and 50 years old (26 organisations; 33% of sample). This is similar to the trends seen in the 2012 survey, which identified 46% of trainees as being under 35 years old and 44% as being between 35 and 50 years old. As with this survey, a small proportion of trainees were older than 50 years in 2012 (10%, compared to 8% of respondents in this survey saying that they work with this age cohort). This data indicates that a large proportion of trainees are older, but not old enough to be aging out of the profession soon.

The most common language spoken among trainees is isiXhosa (Figure 23).

Figure 23. Main home language of trainees (number and % of respondents).
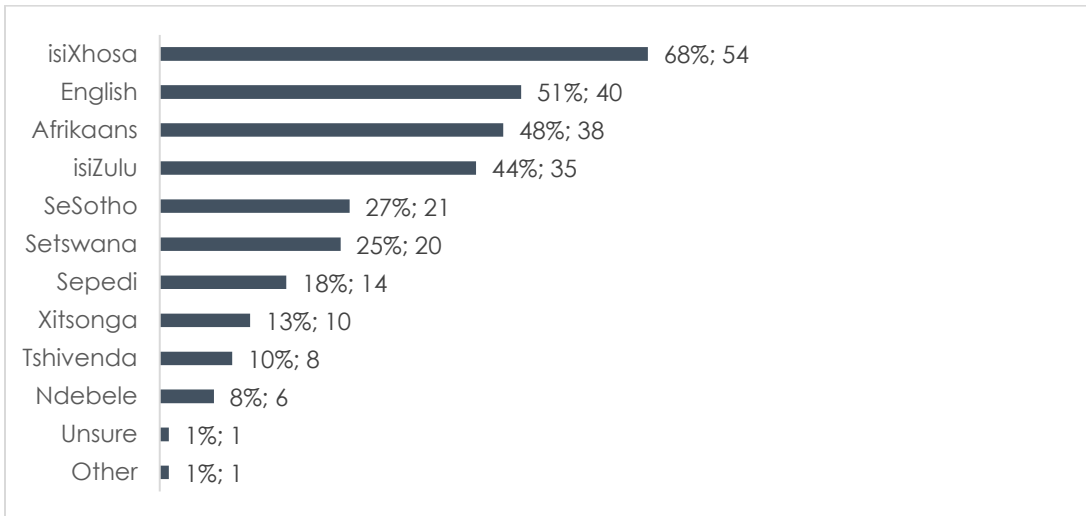
Based on respondents' data, it appears that trainees working in parent education programmes account for the largest proportion of trainees (Figure 24) –a change from 2012. While the data described earlier indicates that centre-based practitioners are the main target of non-accredited programmes, this finding might be explained by the size, spread and variable nature of parenting programmes. An organisation might implement many different one-day parenting workshops with dozens of parents, compared to practitioner programmes which stretch over a longer period of time and enroll lower numbers for closer supervision. Secondly, it might contain double-counted figures - i.e., practitioners also undergo parenting training for in-centre programmes.

Figure 24. Total number of trainees working in different types of ECD programmes in 2022 vs 2012.
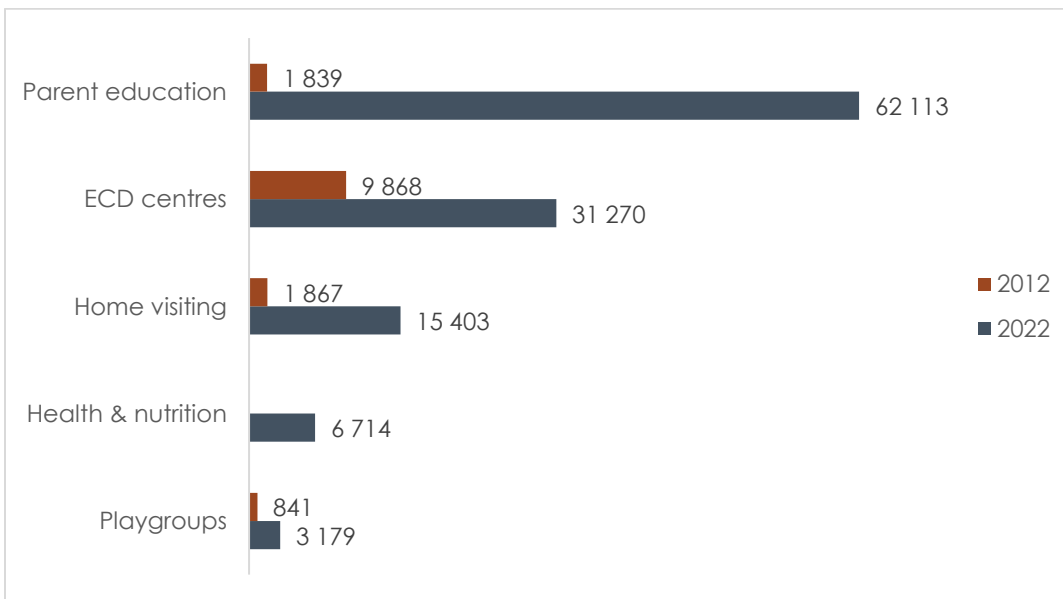
A total number of 1 077 444 child beneficiaries were reported by the respondents; however, this is likely to be an estimated figure as many RTOs do not keep updated, detailed records of secondary beneficiaries. It is also vulnerable to double-counting, as the same child beneficiaries might be associated with caregivers enrolled in multiple programmes. This total number is substantially higher than the figure reported in 2012 –360 515.

Figure 25. Number of child beneficiaries associated with trainees per programme type in 2022 vs 2012.
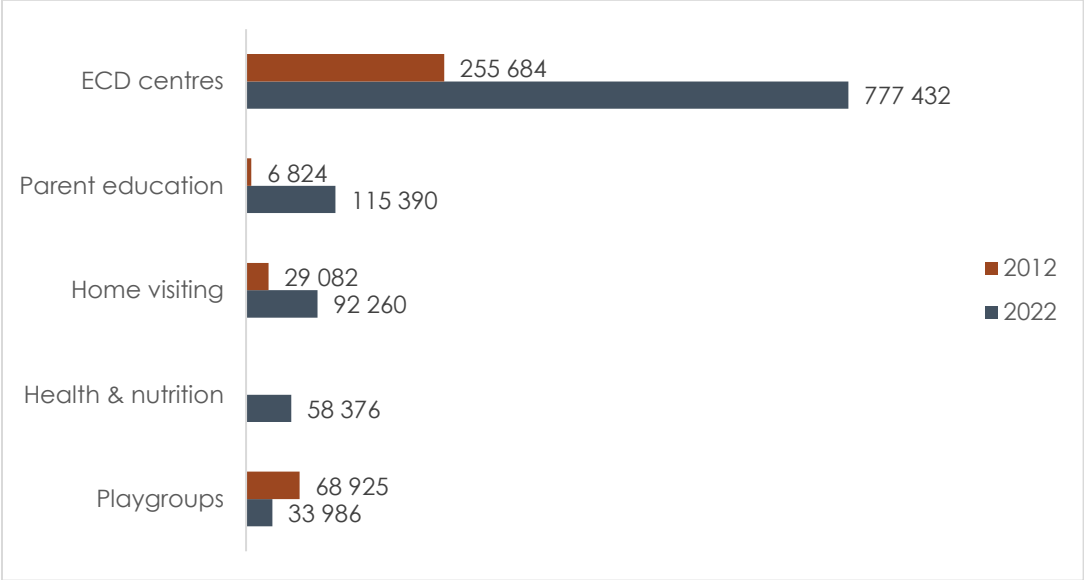
2.7. Support to trainees

2.7.1. Post-training support

The transfer of training/implementation in practice takes time and ongoing support. As such, post-training support is an important service offering from the RTO sector.

A total of 76 organisations (96%) offered post-training support to trainees in the year following either non-accredited or accredited training. Of these organisations, 66% offered support sessions for more than 1 year after training.

Figure 26. Number and percentage of respondents who provide post-training support to trainees.

Support visits to site	66; 84%
Online support	59; 75%
In-person meetings & workshops	54; 68%
Peer support groups/ quality circles	43; 54%
Online meetings & workshops	30; 38%
Newsletter	13; 16%
None	3; 4%

Figure 27. Number of support offerings to trainees in the year following training.
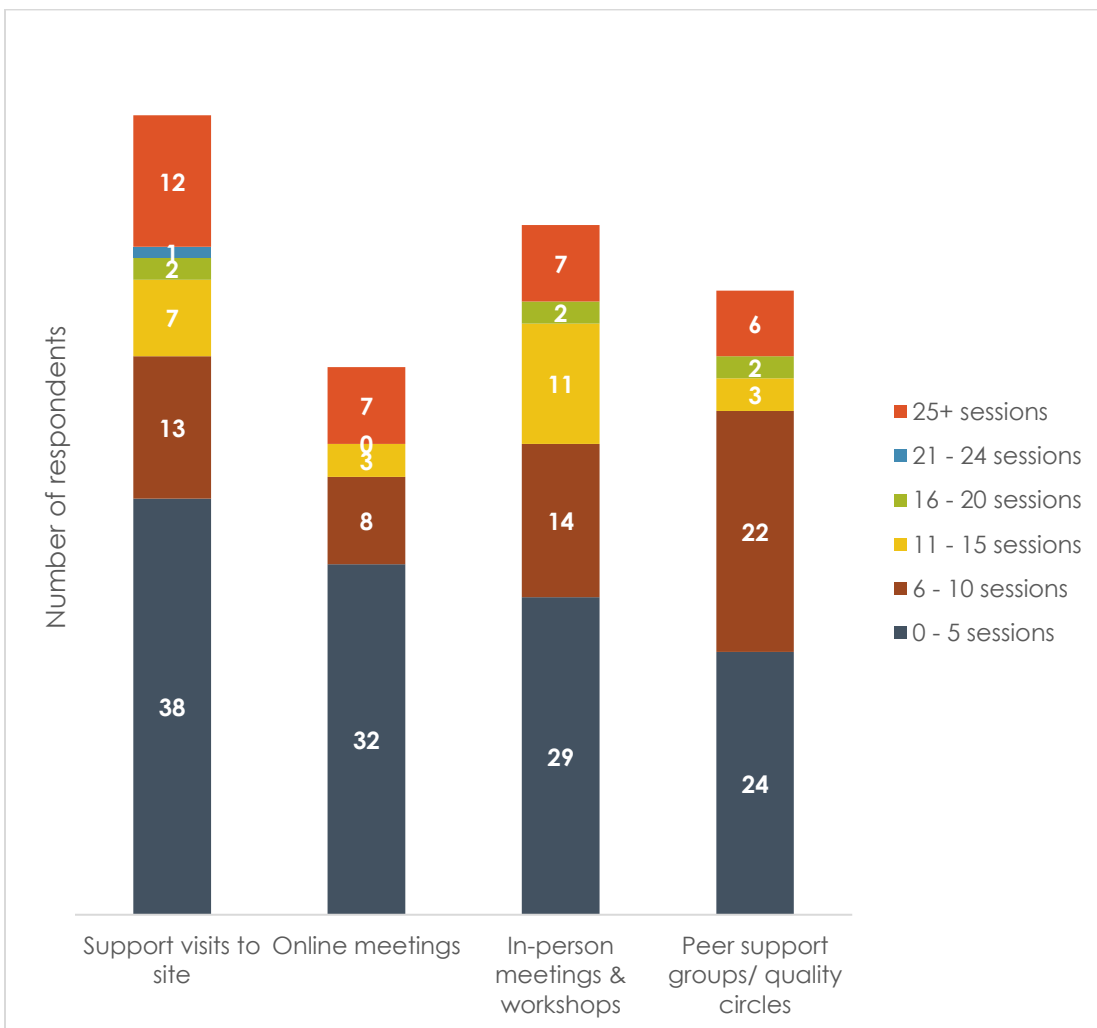
2.7.2.   Support as a standalone service

A total of 48 respondents (61%) offer support to their target community as a standalone service (outside of training). The most common kind of support includes visits to the site, as well as in-person meetings and workshops (Figure 28). Across different support types, most organisations offer up to five support sessions per year (Figure 29).

Figure 28. Number of respondents who offer types of standalone support outside of training.

Support type	Number; Percentage
Support visits to site	38; 48%
In-person meetings & workshops	36; 46%
Coaching & mentorship	33; 42%
None	30; 38%
Peer support group/ quality circles	25; 32%
Online meetings & workshops	20; 25%
Newsletter	10; 13%
Online support	1; 1%
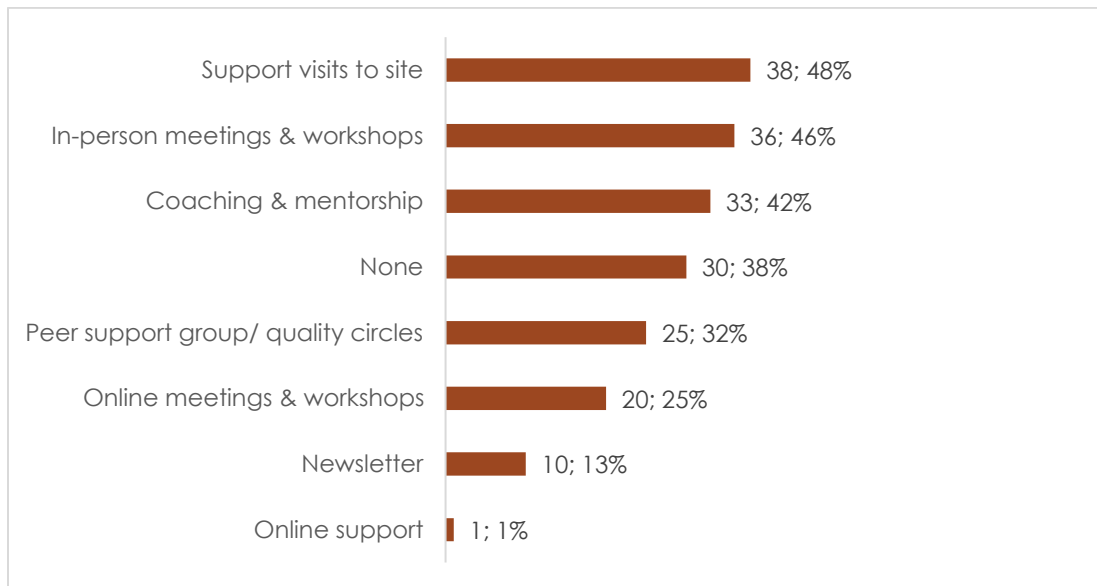
Figure 29. Number of standalone support sessions offered to trainees per year.
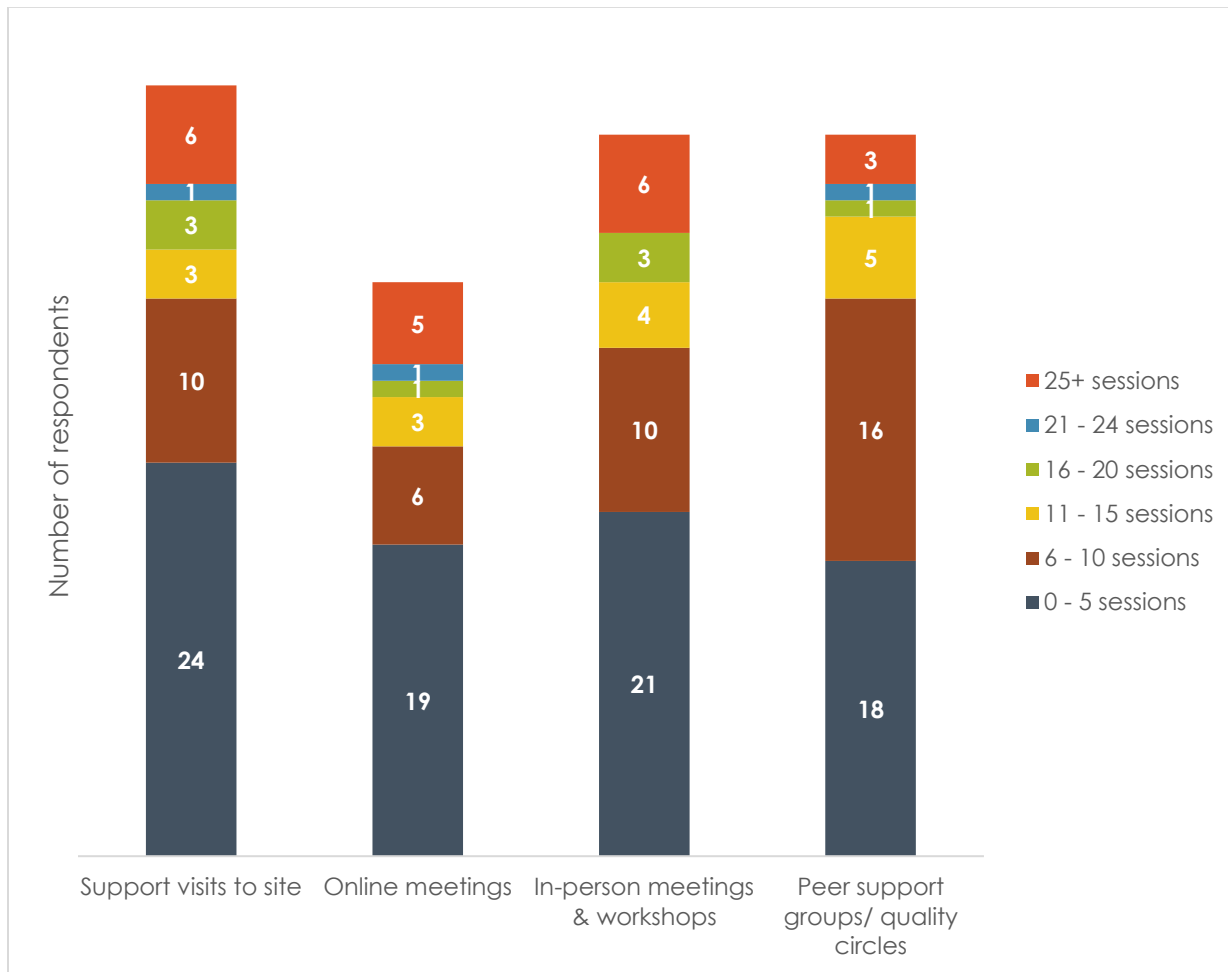
2.8. Staffing

2.8.1. Number and Type of Staff

Since the 2012 survey, there has been a notable increase in the number of staff employed at RTOs in the sector. This can be assumed to reflect the growth in the ECD sector, along with the increases seen in the number of trainees trained in 2022 and the associated beneficiaries (Figure 24 and Figure 25). It is worth noting that 12 survey respondents (15%) come from organisations established after 2012,when the last survey took place.

There is substantial variation in staff numbers across organisations. For example, while most respondents (44%) have no stipend workers/volunteers, 7 respondents (9%) have between 100 and 1 150 volunteers. In terms of total staff size, most organisations have between 11 and 20 staff members – a trend also seen in the 2012 survey. However, a staff contingent in excess of 30 members was the lowest staff size seen in 2012; in 2022, this is the second most common staff size.

Table 14. Total number of staff across respondents.

Staff Category	Total Number 2023	Total Number 2012	Percentage Change
Management & EXCO	362	208	74%
Finance	146	67	118%
Professional (e.g., trainers, material designers)	673	482	40%
Technical support (e.g., IT, M&E)	136	38	261%
Administration	221	140	60%
Drivers	126	45	179%
General workers	204	131	56%
Other*	138	-	-
Sub-total	2006	1111	81%
Stipend/volunteers	3264	2488	31%
Total	**5270**	**3599**	**46%**

Table 15. Descriptive statistics for sample staff.

	Management & EXCO	Finance	Professional (e.g., trainers, material designers)	Technical support (e.g., IT, M&E)	Admin	Drivers	General workers	Stipend/ volunteers	Other
Median	4	2	6	1	2	0.5	1	1	0
Majority range*	1 - 3 (41%)	0 – 1 (43%)	2 – 4 (36%)	0 – 1 (59%)	1 – 2 (58%)	0 (49%)	0 – 1 (58%)	0 (44%)	0 (71%)
Maximum	12	7	83	17	20	17	79	1150	19

Describes the range of staff with the most number of respondents.

Figure 29. Number of respondents per total staff size.
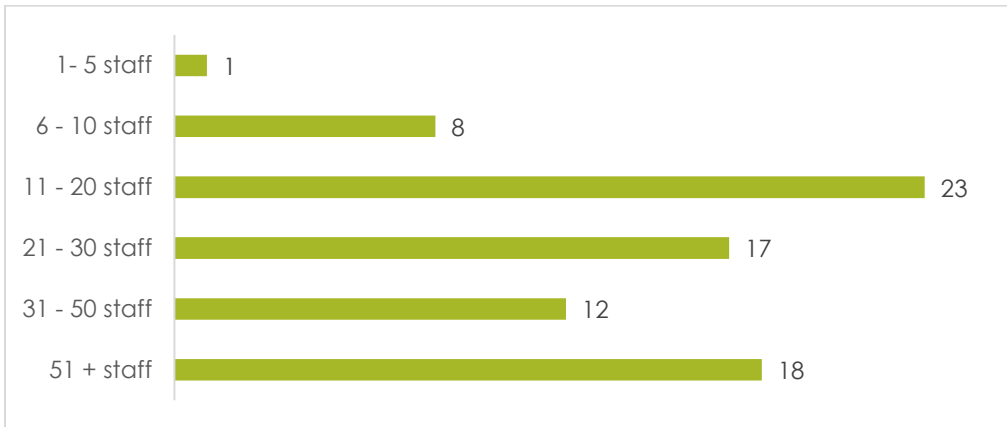
2.8.2. Director's leadership experience

Almost all respondents (95%) report that the organisation's director has received some form of leadership/management-specific training and support – the most common of which is a short course (Figure 30). This is a notable improvement over the 2012 survey, which found that 41% of directors had not participated in any form of leadership, management or business training.

Just over half of the respondents' directors (58%) have been in leadership positions for more than 20 years (Figure 31).

Figure 30. Number and % of directors per type of leadership training.
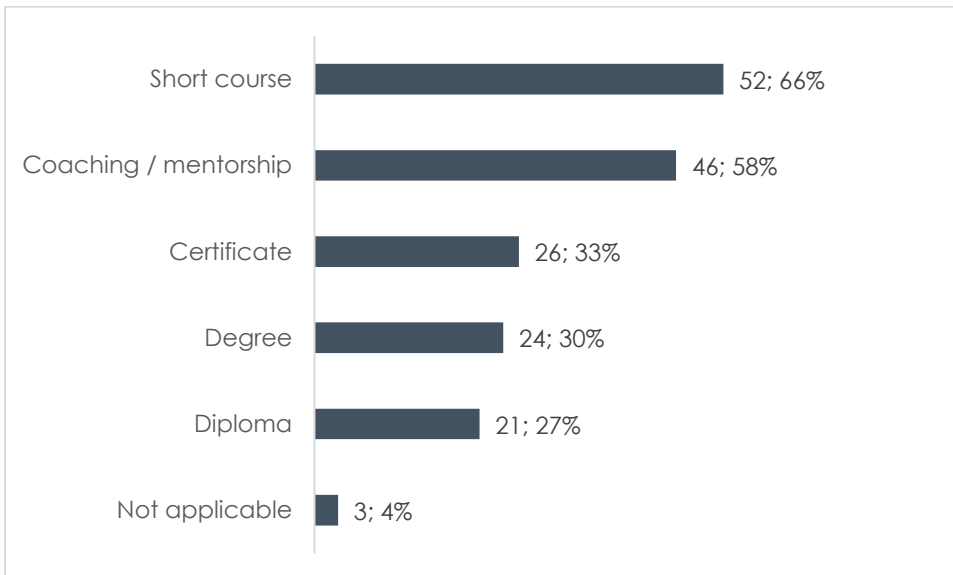
Figure 31. Directors' years of leadership experience (number of respondents).
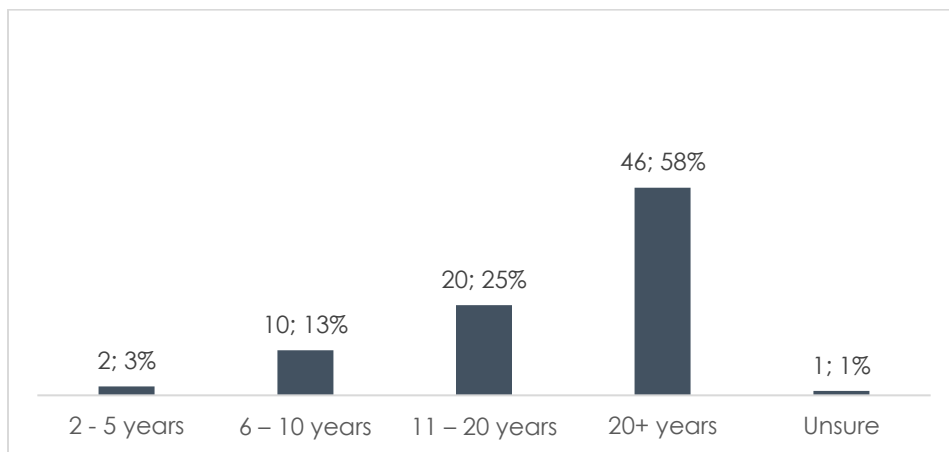
2.8.3. Trainers of ECD qualifications and programmes

All but two respondents report having a number of internal trainers in their organisations, between 1 and a maximum of 83. The median and mode number of trainers per organisation is 5 (22% of respondents). Eight respondents earlier reported that their training is only delivered by partners on their behalf, so it appears that there might have been some confusion around this item.

Respondents were asked to describe up to six of their trainers. The information that follows thus pertains to a maximum of six trainers per organisation. Respondents described 368 trainers; however, some did not provide data for all questions (total number of responses is indicated per item in the graphs below).

As can be seen in Figure 32, the most common qualification being delivered by trainers is the level 5 Diploma in ECD, followed by 'other' (unspecified) programmes, non-accredited programmes, and the level 4 FETC. Only four trainers were reported to be delivering the level 5 Certificate.

Figure 32. Qualifications delivered by trainers (n = 367).
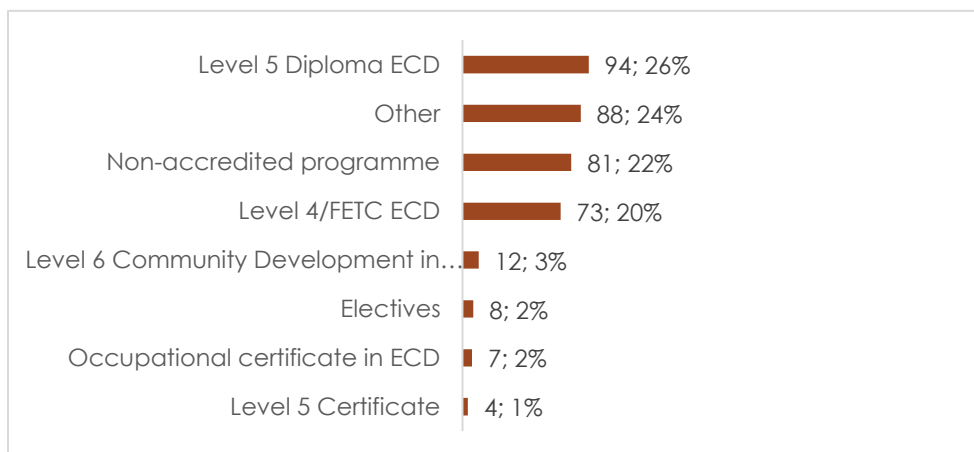
Just over half of the trainers described (57%) are above the age of 41 years, while 43% are between 20 and 40 years old (Figure 33). The majority of trainers (76%) have more than five years of experience in the sector (Figure 34).

Figure 33. Trainers per age category (n = 368).
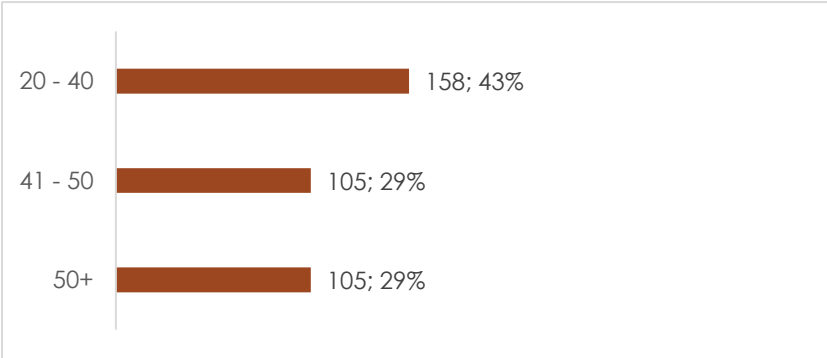
Figure 34. Trainers' years of experience in ECD (n = 363).
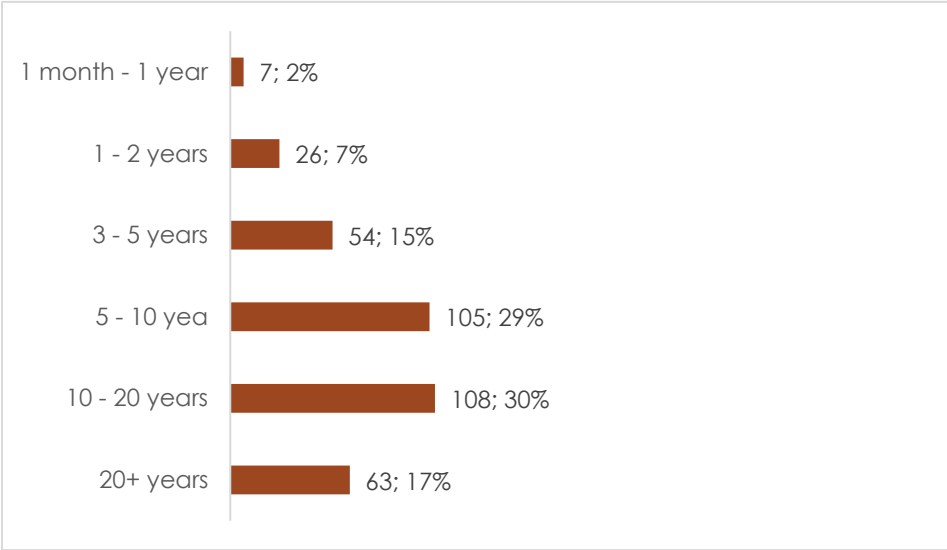
As can be seen in Figure 35, the most common highest education level among the trainers described is a diploma, followed by a certificate. With regards to educational attainment in ECD (Figure 36), many do not have any ECD qualification. Among those that do, the most common ECD qualification is the level 5 Diploma and level 5 Certificate.

Figure 35. Trainers' highest education level (n = 368).

Diploma	111; 30%
Certificate	93; 25%
University degree	74; 20%
Post graduate degree	53; 14%
Grade 12	26; 7%
Other	10; 3%
Grade 10	1; 0%
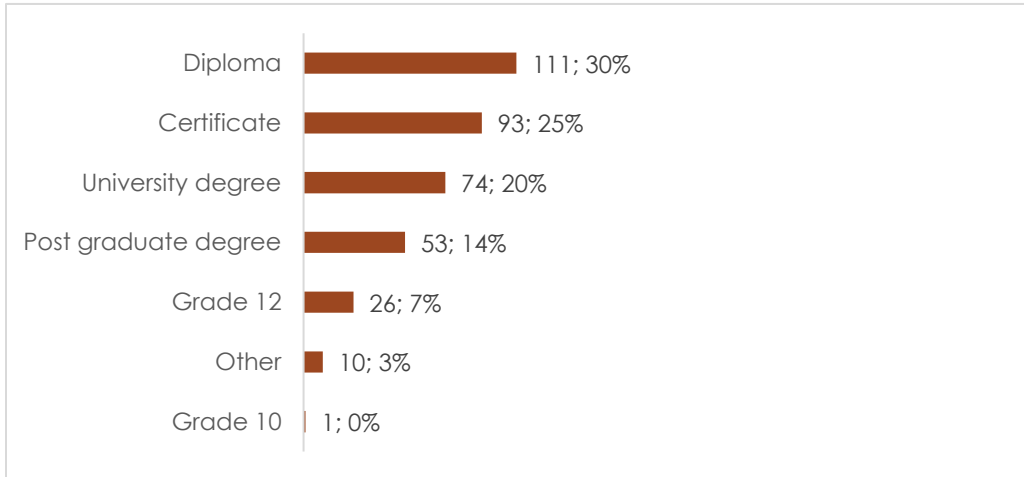
Figure 36. Trainers' highest own ECD qualification (n = 368).

None	87; 24%
Level 5 diploma	83; 23%
Level 5 Certificate	64; 17%
Dip in pre-primary	47; 13%
Level 4	41; 11%
N4,5, 6 Educare	18; 5%
Other	15; 4%
PGCE	5; 1%
NPDE	3; 1%
NCTC	2; 1%
ACE	2; 1%
PPTC	1; 0%
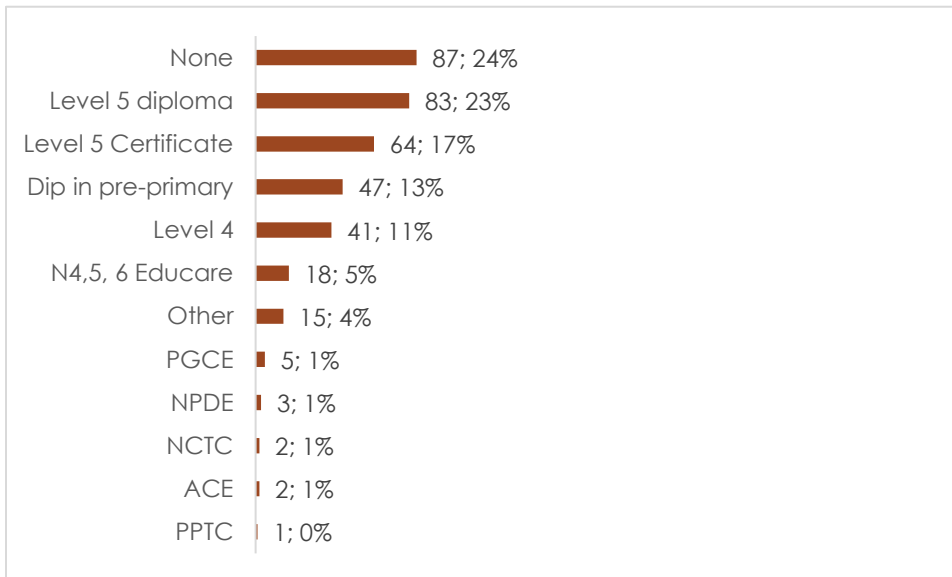
To take an in-depth look at trainers' own ECD qualifications, in relation to the accredited programmes that they deliver, we looked at the information provided by respondents on their trainers' qualifications. It is important to note that this relies heavily on self-reported information which requires respondents to enter data separately and consistently for each of their trainers, and may have been subject to some error.

This analysis revealed the following (see Table 16):

- There are 115 trainers in 30 RTOs offering training for accredited qualifications currently. Of these, 56% (65) have a higher qualification than the programme that they are training, as is SAQA-required practice.

- 35% (40) of trainers are at the same qualification level as they are teaching, the majority of whom (37) are teaching the historic level 5 Diploma. This is in all probability because the ECCE NQF level 6 Diploma has only recently become available as a qualification (those teaching the level 5 Diploma who have level 5 and a university qualification were credited in this exercise as being at a higher level). The remaining 3 of the 40 trainers had a clear qualification option in the occupational band available to them.
- We identified 10 trainers (9%) with a lower qualification level than the programme that they are teaching.
- While these findings suggest that the minimum qualification specifications are met for more than half of trainers, there is a need for upgrading of trainers' qualifications to raise professional standards, even though the Diploma is phasing out and RTOs will not be offering the HEI qualifications unless in partnership with a HEI.

Table 16. Qualifications of trainers in accredited programmes.

Trainer qualifications	Number and %
Above the NQF Level they are training	65 (56%)
At the same NQF Level they are training	40 (35%)
Below the NQF Level they are training	10 (9%)
Total	115

2.9.   Sustainability of organisations and the ECD sector

2.9.1.   Relationships with key stakeholders

Networking and relationships with government departments is critical for providing services to the ECD sector, understanding and attempting to influence policy and regulatory framework initiatives, linking ECD programmes to various support and training opportunities, and, in some cases, delivering services on behalf of government. Most RTOs cultivate these relationships. A substantial proportion of survey respondents (75%) report having a relationship with their provincial DBE, as well as the Department of Social Development (DSD) (Figure 37). In 2012, almost all respondents networked with the provincial DSD and somewhat fewer with provincial education departments. As can be seen in Figure 37 below, this has changed slightly as a consequence of the function shift from the DSD to DBE.

Figure 37. Respondents who report liaising with government departments.
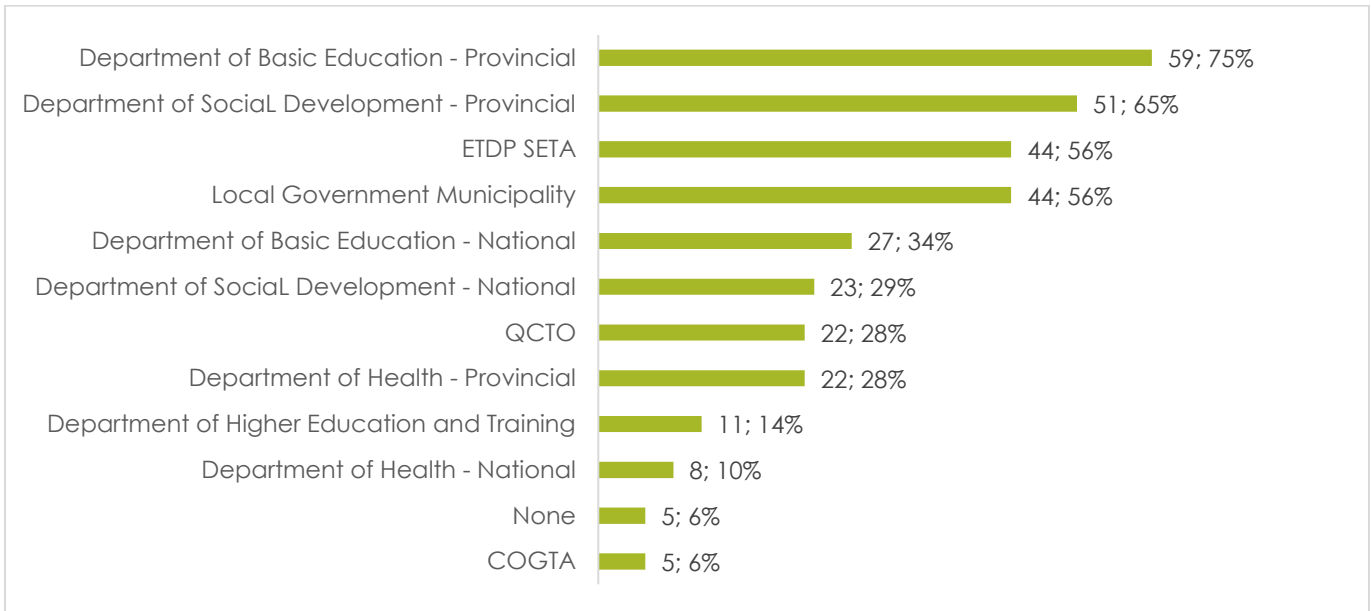
Only 6% of respondents (5) report not belonging to any sectoral network (Figure 38). In 2012, the network with the greatest membership was NECDA, which has since been overtaken by BRIDGE, established in 2013. In the absence of a single communication system or institutional infrastructure to share accurate information and best practices, these networks provide a significant service to the sector.

Figure 38. Number and percentage of respondents who report belonging to sectoral networks[26].

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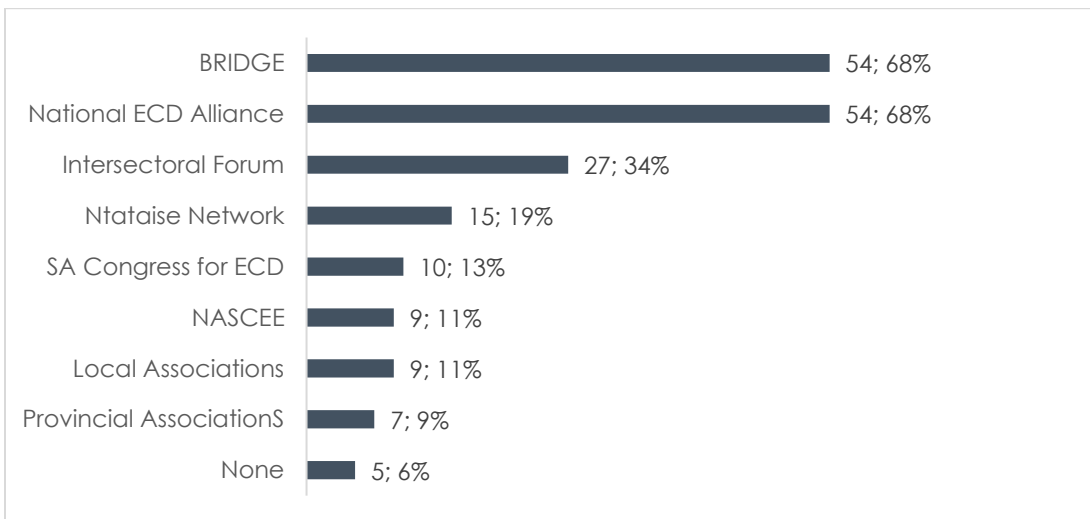
[26] Note that the Intersectoral Forum is not an open access network like BRIDGE and the National ECD Alliance.

2.9.2. Funding

Table 16 shows respondents' funding sources from 2021 until 2023. Trends are consistent over time, with the exception of DSD funds decreasing, and DBE funds increasing, as would be expected due to the function shift.

As can be seen in Figure 39, there seems to be a substantial reliance on donor funding. This was also evident in 2012 (Figure 40). There also appears to be an increase in the number of organisations attempting to self-generate funds through various means.

Table 16. Number of respondents per funding source per year.

Government Funding	2021	2022	2023
Department of Social Development	26	16	8
Department of Basic Education	4	20	25
Department of Health	1	0	0
Local government	4	6	7
Public Employment Programmes	10	13	13
Other government funding	6	7	4
State Agencies	**2021**	**2022**	**2023**
National Lotteries	12	4	2
National Development Agency (NDA)	4	3	2
Donor Funding	**2021**	**2022**	**2023**
International Trusts	41	40	38
National Trusts	45	47	43
National CSI	26	26	27
Local business	37	37	35
Individual donors	52	54	50
Self-generated Income	**2021**	**2022**	**2023**
Events	15	14	15
Service fees and tenders	26	29	25
Sales	14	18	17
Trainee fees	29	30	30

Figure 39. Percentage of respondents per funding category in 2023.
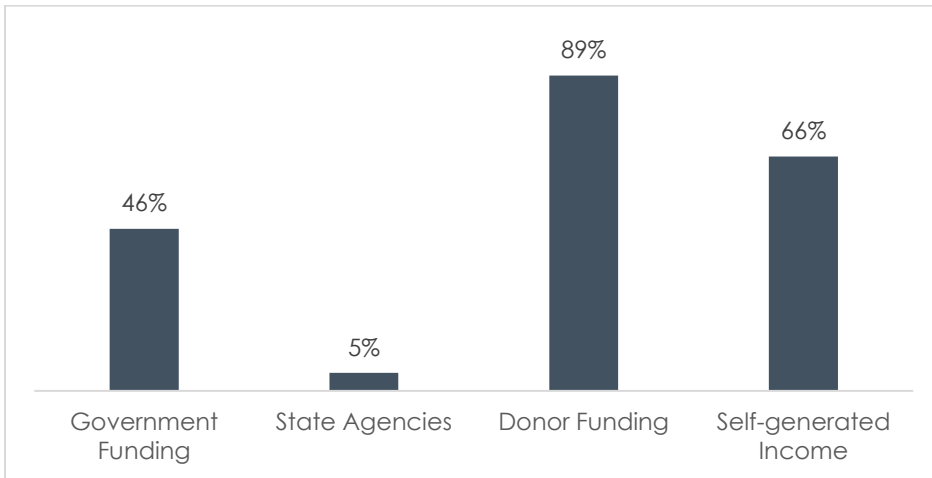
Figure 40. Number of respondents per funding category in 2012 vs 2023.
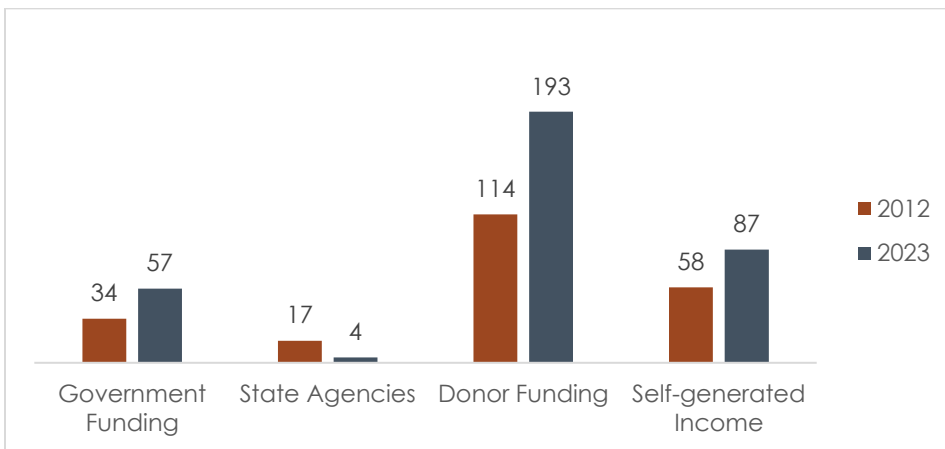
In 2012, most organisations relied on three funding sources, whereas in 2023, almost half of the survey respondents report relying on six to ten sources (Figure 41).

Figure 41. Total number of funding sources across respondents in 2023.
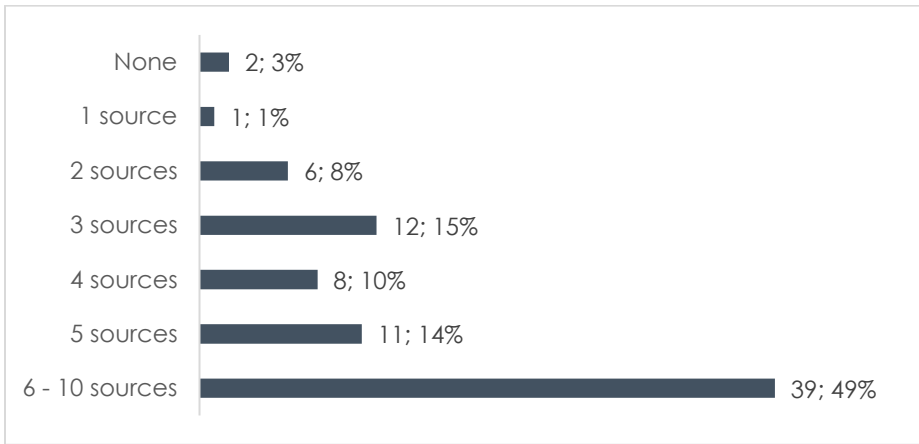
Respondents' self-ratings of their own sustainability has remained fairly consistent over time (Figure 43) – with the exception of 2021, where we see slightly worse ratings (most likely due to the Covid-19 pandemic).

Figure 42. Respondent self-ratings of funding and sustainability per year.
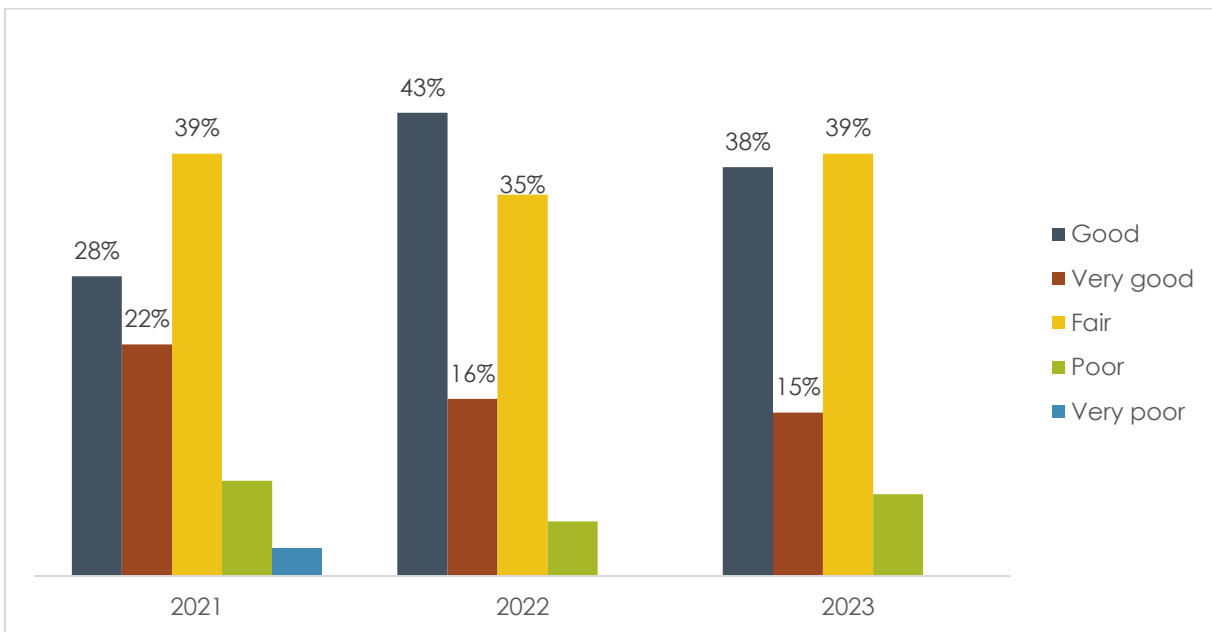
2.10. Support needed to increase training capacity

Respondents were asked what support they need to increase their organisations' training capacity, and to improve the quantity and quality of their impact on the young children they serve in South Africa.

The two categories of support with the highest number of responses were human resource capacity development (n = 79), and financial support (n = 60). Where details were provided, the emphasis for capacity development was on employing more trainers or upskilling trainers through improving their qualifications (n = 48). As noted above, 44% of accredited programme trainers have qualifications at the same level as, or below, the learners they are training.

Several respondents required support for their training staff to obtain basic qualifications. Where data was available, financial support was interlinked with the other support categories, such as implementation and expansion of training programmes (n = 21). This includes: increased capacity for mentoring and coaching; improved funding for practitioner/learner access to training; and growing their staff complement and increasing quality through access to skilling and qualification programmes (n = 16).

Other types of support that respondents identified were assistance with accreditation (n = 10); and the need for physical and operational infrastructure (buildings, vehicles, equipment), as well as information technology infrastructure (n = 21). The latter was especially related to the improvement of monitoring and evaluation systems. Further, respondents felt that building partnerships with government, as well as other RTOs and ECD stakeholders, would enable the expansion of services and sharing of resources (n = 8).

Improved access to resources such as training programmes, online and print learner teacher support materials, and improved beneficiary access to resources such as transport, was another need identified (n = 8). Less common areas of support needed included: support with marketing organisational programmes; obtaining government support, including access to government programmes and funding; monitoring and evaluation of programmes; and further development and scaling-up of programmes.

4. A NOTE ON ECD TRAINING PROVIDED AT PUBLIC TECHNICAL VOCATIONAL EDUCATION AND TRAINING COLLEGES

There is a recognised shortage of sufficient numbers of trained and capacitated ECD staff. The 2021 ECD Census found that just over half (52%) of ECD practitioners have an ECD qualification, 42% are at NQF levels 4 and 5, 10% are at NQF level 6 and above, and 27% underwent a relevant skills programme. Twenty-two percent did not have any relevant qualifications.

Given DHET policy to channel public ECD funding to public TVET colleges, this sector provides the bulk of accredited ECD training in the further education and training (FET) band.

Public TVETs accredited for the occupational qualifications are given in Table 3 above (section 3.3.1). This does not include the 191 and National Certificate Vocational (NCV) Education specialisations offered with DHET funding.

4.1. ECD training offered at public TVET colleges in 2021

Table 17 overleaf indicates enrolments at public TVET colleges across all programmes, as well as those who were involved in ETDP SETA learnerships in the given year.

According to DHET, enrolment in 2021 was 5 072 for occupational qualifications. This includes the historic ECD qualifications (58751, 23117 and 23118) as well as the level 1 GETC ABET ECD (a generic qualification with an optional ECD specialisation). There were 16 405 enrolments for the 191 and NCV programmes. While we do not have RTO-accredited enrolments for 2021, in 2022 there were 3 605 enrolments for levels 4 and 5 programmes –roughly a fifth of the capacity of the public TVET colleges.

Table 17. FET Colleges 191 and NCV enrolment data - 2021.

Province	TVET College	Qualifications					
		191ᵃ	*NCV Education and Development ᵇ*	*GETC ABET & ECD NQF level 1 (73524)*	*58751*	*23117*	*23118*
Eastern Cape	Buffalo City	365	314				
	Ingwe						
	Midlands				41	25	
	Gqeberha						
	Lovedale				43		
Free State	Goldfields	292			177	90	
	Flavius Mareka	1243					
	Motheo	1686	173				
	Maluti	313	286				
Gauteng	SW Gauteng	832	287				
	Western TVET	1705					
	Ekhuruleni West		188				
KwaZulu-Natal	Umgungundlovu	562	266		549	48	
	Umfolozi	84	81		32		
	Coastal KZN	835	444				
	Thekweni	58	198				
	Mnabithi	278	108		572		
	Esayidi		183				
	Majuba				30		
Limpopo	Waterberg		164			50	
	Vhembe	104					
	Mopani	63					
	Capricorn	571	404				
	Lepalale	36			41		
Mpumalanga	Gert Sibande				27		
	Nkalangala		8				
North West	Orbit	283					
	Vuselela		220		78		
Northern Cape	NC Rural				81	21	19
	NC Urban					17	
Western Cape	Boland	704			287	171	69
	College of CT	677	187		427	191	55
	False Bay	638			254ᶜ	190	77
	North Link	870		111	569	171	80
	South Cape	590			92	139	26
	West Coast		53	103	283	198	

Source: DHET database.

ᵃ The 191 programme data includes enrolment of two cohorts; data is not complete for everyone

ᵇ Covers the N2 – 4 intake for that year.

ᶜ Includes a learnership of 82 learners.

4.2. ETDP SETA Recognition of Prior Learning (RPL) project

There are many experienced practitioners in the ECD sector but as noted above, RPL is not widely offered. The ETDP SETA RPL[27] Project for ECD Practitioners was started in 2016/17, aimed at further developing RPL through public TVET colleges. The ETDP SETA uses RPL as a mode of delivery for the FETC: ECD Practitioner level4 (140 credits). Table 18 shows the learner allocations for the RPL project by province.

For 2023/4, there is funding for 400 learners across the Free State, Gauteng and Mpumalanga.

Table 18. RPL learner allocations per province and year (E = enrolled; C = completed)

Province	TVET College	2016/17		2017/18		2018/19		2019/20		2020/21		2021/22		2022/23
		E	C	E	C	E	C	E	C	E	C	E	C	E
Eastern Cape	Midlands	40	37											
	Buffalo							75	67					
Free State	Goldfields			50	47	100	98							75
Gauteng	SW College											50	50	50
KwaZulu-Natal	Umgungundlovu	40	27									75	63	
	Mnabithi					25	25			50	45	75	72	
	Umfolozi					75	75			100	94			75
Limpopo	Waterberg					100	90							50
Mpumalanga	Gert Sibande			50	50									
	Nkalangala			50	0					50	47			
Northern Cape	NC Rural			100	75			75	75					
North West	Orbit	50	0											
	Vusilela	50	0											
Western Cape	College of CT	40	37											
	Boland College	40	0											
	Northlink College	40	35											
Total		300	136	250	176	300	298	150	142	200	186	200	185	200

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[27] Recognition of prior learning (RPL) is about the skills and knowledge a person has collected through work and life experiences, and then transferring them to current training course requirements. ETDP SETA presentation to the NECDA AGM 8 June 2023. For more information see: https://www.etdpseta.org.za/etd/sites/default/files/2023-01/ETDP-SETA-Information-Brochure.pdf

5. KEY ISSUES, IMPLICATIONS AND RECOMMENDATIONS

5.1. Key issues since 2012

To provide ELPs of sufficient quality to improve child development and learning outcomes, there is a need for professional development, including both the provision of qualifications and ongoing support, as well as programme improvement measures. This survey provides a comprehensive overview of the current training landscape which can be compared to the 2012 survey:

- **Trends in RTO service offerings:** There has been a significant growth in the number of RTOs based in KwaZulu-Natal since 2012, which is important for serving the ELPs which are often based in rural areas. There has also been a substantial growth in the number of trainees across provinces since 2012.
- **Type of training offered:** In many respects there are similarities between the 2012 and 2023 surveys including the quite limited provision of accredited training compared with non-accredited training (due to public funding sources favouring public providers). The main topics for non-accredited training remain similar; prioritised areas include curriculum-related inputs, parenting and other non-centre based programmes, and management and leadership. However, there is a more explicit focus on play-based learning in courses which is possibly a response to increasing formal delivery of the ECE learning programme in recent years. Certain aspects of inclusivity, such as gender awareness, are currently highlighted.
- **Delivery formats for training:** Modules remain the most common training delivery format for accredited (and therefore longer) programmes but there is an increase in blended programmes, which can be expected with recent technological advances. While online and digital programmes are an attractive option for increasing scale, concerns have been raised about maintaining sufficient practical support.[28] RPL provision remains low with a similar number of providers in 2012 and 2023.
- **Staffing:** There has been a notable increase in the number of staff employed at RTOs in the sector since 2012. Roles with significant growth include finance, technical support (e.g., IT and M&E), and drivers. Growth in finance and technical expertise is likely in response to donor requirements and technological advances, while an increase in the number of drivers employed may reflect the regional expansion of RTOs' coverage (particularly in rural areas).
- **Capacitation needs:** As in 2012, the need for sustainable funding to enable organisations to operate continues to be a major constraint for many RTOs. The survey highlights the continued dependence of the RTO sector on donor funding, as well as growing attempts to generate self-

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[28] DBE (forthcoming) The Deep Dive ECD Quality Study.

sustaining income. It has previously been raised that the need to focus on income generation may dilute capacity for service delivery and core business, and possibly add to access barriers among trainees by requiring fees. Additionally, expanding training skills and/or employing more staff was identified as necessary for service expansion, which was also raised in 2012. A small number of trainers have a lower level of qualification than the programme that they are teaching; there is therefore a need in some organisations to upgrade trainers' qualifications to raise professional standards. The need for M&E support was noted in both surveys but from the staffing profile of current respondents, it appears that there has been significant developments in M&E and support with data systems.

5.2. Key implications

The training gap identified in the ECD Census is that 48% of the 2021 workforce lacked an ECD qualification. Filling this gap is a priority, but so is upgrading those with existing qualifications and expanding the provision of ECD programmes for universal access. For example, even without considering the upgrading of practitioners with an NQF level 4 to level 5, or level 5 to an ECCE Diploma, the Census suggests that there is a current need among approximately 80 000 teaching staff to upgrade to an NQF level 1 or level 4. In addition, in order to reach universal ECD programme access, the workforce would need to expand to an estimated additional 300 000 early learning practitioners and assistants.[29]

The RTO sector and public TVET colleges constitute the main training supply for ELP staff serving poor communities. In addition, RTOs occupy a particular niche by providing a range of services including practical, on-site support and short non-accredited training programmes which have been identified as enabling quality delivery. RTOs are very well-placed to assist the developing QASS initiative. With this in mind, the following are key areas for attention:

- Despite policy preference for public providers to deliver publicly-funded accredited programmes and learnerships, the RTO sector currently provides about a fifth of subsidised, accredited ECD training – mostly through donor support.
- Given that registration of the historic qualifications has expired and the 191 programme will be fully phased out by 2025, the limited numbers of accredited providers for the Occupational ECD Practitioner Qualification (97542) is a concern. The QCTO has recently scoped a Higher Occupational Certificate: ECD Centre Manager at NQF level 5 but it is not yet registered and

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[29] Brooks, L. & Bornman, S. (2022). State investment in early childhood development sector can empower women and combat gender-based violence. *Daily Maverick*. https://www.dailymaverick.co.za/article/2022-10-31-state-investment-in-early-childhood-development-sector-can-empower-women-and-combat-gender-based-violence/

does not include a learning programme focus. This is because the Higher Certificate and Diploma in ECCE are intended to meet this need. These too are not yet widely available. The requirement for programme registration in the ECD Regulatory Framework of a NQF level 4 or 5 for the principal will be difficult to meet under these conditions.

- Similarly, although a level 1 Occupational Certificate for assistants is being scoped, and a previously scoped level 3 Occupational Certificate may be reviewed and registered, there is no current replacement for the deregistered Unit 2 and 3 Standards which provide a skills programme for assistants and ECD practitioners unable to cope with the demands of NQF level 4 and above. Therefore, there is a role for RTOs as providers of support and short courses to support quality roll-out, providing some form of recognition with SACE endorsement.

- Given the time and cost of developing learning programmes for accredited qualifications, RTOs should consider entering partnerships with those organisations whose learning programmes have already been aligned to the new qualifications and approved.

- Regarding non-accredited training and support, the survey findings confirm that the majority of providers are focusing on curriculum-related issues (including play and literacy), management and parenting support. These are key domains identified in recent quality studies[30] [31] [32] and in the draft QASS system[33]. Endorsement of these short courses with SACE provides an avenue for recognition for both providers and participants. This indicates that, with additional financial support, RTOs could provide significant assistance in improving the quality of ELPs – which is a state priority.

- In the longer term, given a significant supply of non-accredited training, the DBE Human Resource Development Initiative should explore possibilities of credentialing programmes so that credit towards a qualification could be received for completing short courses (see recommendations below).

- The survey highlighted the need for a consolidated current database of enrolments in, and completion of, accredited qualifications, as well as information on funding sources and allocations for subsidised training. In addition, a current list of all providers accredited for, or offering, SAQA-registered qualifications should be available.

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[30] Biersteker, L., Kvalsvig, J., Zastrau, E. & Carnegie, T. (2023 - *forthcoming*). Deep Dive Quality Study Draft. Department of Basic Education.

[31] Henry, J. & Giese, S. (2023 - *forthcoming*). The Early Learning Positive Deviance Initiative - Summary Report of Quantitative and Qualitative findings. Cape Town, DataDrive 2030.

[32] Umalusi. (2021). Practitioners' perceptions and understanding of the approaches underpinning curriculum and pedagogy in an early childhood classroom. Pretoria. https://www.umalusi.org.za/wp-content/uploads/2021/09/Umalusi-ECD-Study-Final-Edited.pdf

[33] Department of Social Development. (2022). Draft Quality Assurance and Support System. Cape Town, Ilifa Labantwana.

5.3. Key recommendations for future research

While this survey has highlighted a number of key issues and trends in the non-profit training sector, the findings also indicate areas that warrant future exploration. These include:

- A survey of private providers of ECD qualifications. Private providers are the majority providers on accredited databases. However, many may not be currently offering learning programmes, or may only be offering a limited number of programmes or targeting particular income quintiles. It is therefore important to scope the extent, costs and details of how these programmes are offered to fully understand the training supply.
- A follow-up on survey non-respondents to establish whether they are still operating. A number of non-respondents that we identified are key established RTOs who are important to service particular regions.
- While substantial efforts were made to map as many RTOs as possible, there are a number of organisations (large and small) that were not reached, and some may not have made it onto our initial list of organisations. A mapping exercise that focuses solely on identifying the name, location and main services of RTOs around the country is thus recommended as a potential source of support for quality improvement initiatives.
- The DBE ECD Human Resource Task team should explore the possibilities of credentialing as an avenue of recognition for programmes that are not currently accredited. How this links to the qualifications' framework and accredited qualifications, as well as the implications in terms of the administrative costs to providers and quality assurance bodies, should be a part of this investigation.
- This survey highlighted a substantial focus on parent training programmes in the non-accredited space. Programmes that support parent involvement and education in ECD have recently been scoped by UNICEF (but not yet published). When available, this information should be assessed to determine whether further research is needed in this part of the sector.
- As blended and online learning programmes have increased since the pandemic, there may be concerns about maintaining sufficient practical support whilst using these formats. It is thus recommended to deliberately explore the effectiveness and feasibility of these modes of programme delivery, particularly in terms of practical support and quality, and trainees' access and digital literacy.