

“But I want to teach?”: A critical discourse analysis of the 2018 Funza Lushaka Bursary Agreement Form

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PTRCAR021

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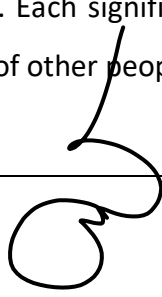
University of Cape Town

2021

COMPULSORY DECLARATION

This work has not been previously submitted in whole, or in part, for the award of any degree. It is my own work. Each significant contribution to, and quotation in, this dissertation from the work, or works, of other people has been attributed, and has been cited and referenced.

Signature: _____



Date: 09 September 2021

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The growth mindset celebrates *small* wins: when you hit your first ball and you hear the ball meeting the bat. It may not have gone far, but you have the *feeling* of a small win. This is how I felt during my minor dissertation under the guidance of Dr Yunus Omar and Prof Azeem Badroodien: celebrating my small wins until I had enough confidence and enough momentum to hit a six and complete this thesis. I express my gratitude for their continuous support, motivation and endless patience with the final leg of this adventure.

I express appreciation to the University of Cape Town, particularly the School of Education, for their incredible work and influence on Initial Teacher Education in South Africa.

This thesis, and the next one, remains dedicated to my wife – Jacqui – for her patience and endless support of me achieving my dreams, no matter how small.

ABSTRACT

Despite efforts by the government, the quality and retention of teachers in South African schools remain challenges. This minor dissertation explores the discourse(s) in the Funza Lushaka Bursary Agreement Form (NSFAS, 2018) and its impact on bursary holders, including newly qualified teachers. It asks two central research questions: (1) how does this document impact the bursary holders? and (2) to what extent does the discourse(s) it uses exert power over its applicants? The research approach adopted for the study is qualitative. The Funza Lushaka Bursary Agreement Form is analysed using Norman Fairclough's theory of critical discourse analysis and Michel Foucault's theories on embedded power and use of time to demonstrate control. This approach is supplemented by Bigo's (2018) concept of silence and its intended and unintended consequences.

Keywords:

Critical discourse analysis; Funza Lusaka Bursary; Funza Lusaka Bursary agreement form; power; teacher retention; South Africa

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ABBREVIATIONS & GLOSSARY

B.Ed.	Bachelor of Education
CDA	Critical discourse analysis
DBE	Department of Basic Education
ITE	Initial Teacher Education
JET	Joint Education Trust
NQT	Newly Qualified Teacher
NSFAS	National Student Financial Aid Scheme
PED	Provincial Education Department
PGCE	Postgraduate Certificate in Education
PRESET	Preservice Education for Teachers
PTR	Pupil-teacher ratio
SADTU	South African Democratic Teachers Union
SDG	Sustainable Development Goals
SGB	School Governing Body
The bursary	Funza Lushaka Bursary Programme
VSP	Voluntary Severance Package for Educators

CHAPTER 1: INTRODUCTION

'This book is written between rather than against.'

(Ball, 2003:1)

In September 2015, South Africa committed to the Sustainable Development Goals (SDG), which aim to transform the world by 2030. The fourth SDG goal is 'Quality Education: Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all' (United Nations, xxx). In 2015, Minister of Education Angie Motshekga stated in the 2015 annual budget speech that improved teacher training would see 'every learner in every classroom (to) be taught for the required number of hours per day, by a qualified and competent teacher' (Motshekga, 2015).

Yet South Africa's post-1994 education system is struggling to advance, its ankles bound by the rusted shackles of its oppressive past. In 2018, almost 80 per cent of Grade 4s could not read for meaning in their home language (Spaull, 2018). Schools are still battling with the challenges of the systemic effects of inadequate and unequal education. South African schools have experienced major curricula reforms and rewriting of policies for the teaching profession in response to political changes in government. Democratic South Africa saw policy makers working quickly to put mechanisms in place to help shape the teaching profession in accordance with new social ideals. Yet teacher supply, teacher quality and teacher retention remain serious challenges for South African education.

Policy matters: it steers behaviour and resources. What may be overlooked is its impact on people. For example, changes in education policy saw teachers resigning to emigrate or being declared in excess. In this minor dissertation, I analyse aspects of a the Funza Lushaka Bursary Agreement Form (hereafter also referred to as the bursary). In doing so, I also draw on my own

experience as a recipient of the bursary and a newly qualified teacher (NQT) who completed my obligatory teaching years.

I began my research with some strong feelings *against* the bursary. My own journey was painful and conflicted. After completing my teacher training, I was deployed into the state system, armed only with deep feelings of unpreparedness. The common thread of the journal I kept throughout the four years of completing my obligatory teaching was the contradiction of having to teach despite wanting to teach. I felt that the person of the teacher was alarmingly absent in the design of the bursary. The bursary holder's hopes and dreams were assumed to be linear and logical to map with certainty for a few years.

I was sensitive to the bursary's shortcomings on a personal and professional level and more broadly in promoting equity in education. My frustrations included an ineffective placement process, lack of support in the early years of the teaching profession, and disappointed hopes for social change. This sense of frustration and disempowerment is embodied in the title of this research document: 'But I want to teach?'. As a bursary holder, I had little understanding of the complexities involved in its intention and implementation. As suggested by the question mark in the title, however, I was driven to develop and explore my subjectivity. What started as a position *against* many of the bursary's practices morphed into an exploration of the space *between* policy and lived reality, intent and implementation, and silence and power. This space – like policy, discourse, and positionality – is relative and fluid.

My exploration and change in viewpoint are in keeping with the theoretical stance of critical relativism employed in this study. Critical relativism 'reminds us that appraisal criteria are relative to a specific research community and a particular epoch' (Anderson, 1986:157). Any analysis is inevitably by a particular person and at a particular moment in time. In the diverse historical and contemporary contexts of South African schools and teachers, the act of imposing any one truth is impossible. This study acknowledges this truth while aiming to explore just one truth reflecting one experience, mine, to elicit an academic contribution to improving how new teachers are set up for success in schools.

This stance is informed by a subjective understanding of empirical research. According to Bhattacharya (2012:254), empirical research 'is grounded in the belief that direct observation of phenomena is an appropriate way to measure reality and generate truth about the world' (Bhattacharya, 2012:254). It relies on the assumptions of logical positivism, which suggests that 'social phenomena can be studied scientifically when modelled along the objective, experimental, verifiable and generalisable methods of the natural sciences' (Bhattacharya, 2012:255). But reaching further into the field of empirical research reveals the movement of empiricism where 'there is knowledge only from experience' (Paley, 2012). In this study, my experience as a bursary holder drives the research intent and informs the theoretically backed arguments.

Continuing with this approach, I see my research in the context of moral anthropology, which investigates how social agents tell right from wrong (Caduff, 2011:466). It acknowledges moral positionalism and asks critical questions around ethics in positionality. I bring my social justice lens to this research. My theoretical stance distinguishes a right from a wrong, echoing the fundamental stance of critical relativism to allow analysis within its context to enhance the richness of my research method. It carries an explicitly ethical and nuanced approach to complex social phenomena, weaving academic philosophies with lived experience. It also explains my selection of the framework of critical discourse analysis (CDA), which is 'linguistics with a conscience and a cause, one which seeks to reveal how language is used and abused in the exercise of power and the suppression of human rights' (Widdowson, 1998:137).

I then analyse the discourse(s) that emerges from a single document, namely the 10-page Agreement Form (NSFAS, 2018; refer to Addendum A) entered into between the National Student Financial Aid Scheme (NSFAS), the institution that administers the bursary, and the recipient of the bursary. The Agreement Form serves three main functions, which inform the complexity of my analysis. Its first and most obvious function is as a legal contract to specify the bursary terms and the various parties' relevant legal rights and responsibilities. Its second function is as a mechanism for collecting the bursary holder's personal and financial details. The

third is as the tool through which the more abstract bursary ideals are made tangible to and bind individual recipients.

I explore the context and discourse(s) in the Funza Lushaka Bursary Agreement Form and its impact on bursary holders, including NQTs. I ask two central research questions: (1) how does the Funza Lushaka Bursary Agreement Form impact the bursary holders? and (2) to what extent does the discourse(s) the Agreement Form uses exert power over its applicants? These questions are qualitative and reflective, acknowledging my positionality as a bursary recipient. I analyse the Agreement Form primarily using Norman Fairclough's theory of CDA and Michel Foucault's social theories on embedded power and use of time to demonstrate control, supplemented by Bigo's (2018) concepts around the consequences of silence.

This introductory chapter that gives an overview of the study is the first of five chapters. Chapter 2 (Literature Review) provides essential context by drawing from existing literature in this field teacher education, to explore how the pre- and post-1994 South African governments engaged teachers, paying attention to thinking around the problem of teacher turnover (Department of Education, 1995; Hofmeyr and Hall, 1996; Departments of Basic Education and Higher Education and Training, 2011).

Chapter 3 (Methodology) presents the justification for the choice of research methodologies.

Chapter 4 (Analysis) describes the study's analysis as well as the implications of my position as a bursary graduate through the concept of bracketing (Tufford & Newman, 2010). This section also relies on literature to outline the implications of the theoretical stance of critical relativism and presents the research methodology of CDA (Majchrzak, 1984; Janks, 1997; Widdowson, 1998; Eriksson & Kovalainen, 2011). It asks, *Why do we study policy?* (Ball, 1994; Rizvi and Lingard, 2010) and introduces key ideas about discourse analysis in the context of social responsibility (Mbembe, 1992; Fairclough, 2003; Berger, 2016). It situates this study within the wider field of scholarship on embedded power and CDA using the works of leaders in their respective fields, Foucault (1975, 1994) and Fairclough (2003, 2005). I draw on the notion of embedded structures

of power informing the behaviour and experiences of bursary applicants. Underpinning this analysis is Foucault's notion of power through the imposed use of time, space and behaviour.

Finally, Chapter 5 presents concluding thoughts and recommendations based on the findings.

CHAPTER 2: LITERATURE REVIEW

According to Burton (2011:61), the function of a literature review is to address what is known on the topic and situating the researcher in relation to that knowledge.

This chapter presents the historical landscape around education policy pre-1994 (Christie and Collins, 1982; Education Department African National Congress, 1994; Hofmeyr and Hall, 1996; Jansen, 1998; Chisholm, 2003; Baxen and Botha, 2016) and post-1994 (Mullis et al., 2007, 2016; Salmon and Sayed, 2016). I present insights on the school curriculum and teacher engagement, reviewing how South African teachers responded to these changes through rates of teacher turnover, teacher supply and teacher retention (Cochran-Smith, 2004; Wolhuter, 2006; Boe, Cook and Sunderland, 2008; Richardson, Alexander and Castleberry, 2008) to provide context as to how current teacher education and retention policies are bound up with this complex political and historical context. I also describe the purpose of the Funza Lushaka Bursary Programme and explore South Africa's performance against international educational benchmarks (Robinson, 1999; Mullis et al., 2007, 2016; Spaul, 2018).

2.1 The South African context

2.1.1 South African teaching context post-1994

This section introduces important context on racially segregated education systems involving teachers and students, pupil-teacher ratios (PTRs), including the imagined experience of a teacher, Miriam, during an uncertain time of early curriculum reform (Hofmeyr and Hall, 1996; Robinson, 1999).

The 1995 National Teacher Audit presented insight into the conditions of teachers at the end of formal apartheid. It explored the effect of what was then called Preservice Education for Teachers (PRESET), which had previously been implemented by the government in all teacher education curricula. The quality of PRESET was very variable, with 'nodes of excellence and innovation' but poor quality overall (Hofmeyr and Hall, 1996:330). PRESET was strongly influenced by the ideals

of Christian National Education, encouraging teacher-centred and authoritarian pedagogy (Hofmeyr and Hall, 1996:60).

PRESET reflected the apartheid philosophy of racial division, highlighting the role of education policy in shaping a nation for a particular purpose at a particular moment in time (Christie and Collins, 1982:74). A segregated nation required segregated education, which required segregation in teacher training (Sayed et al., 2016:57). Before 1994, teacher education colleges were racially segregated, making for duplications in expenditure and ineffective and skewed student-teacher ratios (Education Department African National Congress, 1994:94; Baxen and Botha, 2016:1). Resource allocation in teacher education was based on racial categories: whites received abundantly more resources than blacks and coloureds (Baxen and Botha, 2016:1).

The post-1994 government inherited an unbalanced public service in which over 95 per cent of senior civil servants were white and less than one per cent black African (Franks, 2014:48). A side effect of this imbalance was the limited availability of black African teachers in African schools. According to the National Teacher Audit (1995), the PTRs in 1995 were highly skewed.

Table 1: 1995 report on pupil-teacher ratio in primary and secondary schools (Hofmeyr and Hall, 1996:29)

Total PTR (Primary and Secondary Schools) in 1995					
	African	Coloured	Indian	White	Total
National average	39:1	24:1	22:1	20:1	34:1

As indicated in the table above, pupils of colour experienced significantly larger class sizes compared to their white counterparts. PTRs also varied throughout the country. In the Eastern Cape, for example, African students had PTRs at 45:1, whereas white students had PTRs at 19:1 (Hofmeyr and Hall, 1996:29).

As of 1996, an attempt to redistribute the race-based skewed teacher allocations began. Many teachers were declared in excess or were right-sized, with the government redistributing teachers according to pupil-teacher ratios. This programme was officially known as the Voluntary Severance Package for Educators (VSP) (Department of Education, 1996:3). By 1998, the VSP proved to be deeply problematic. The message of teachers in excess perpetuated an image that there were too many teachers in service. It resulted in skilled, experienced teachers emigrating to teach elsewhere and the teaching profession becoming ‘an unattractive career choice’ (South African Council for Educators, 2011:6). Between 1995 and 2005, emigration levels increased, with South Africans heading to Australia, Canada, the United Kingdom, the United States and New Zealand (De Villiers, 2017:213). In Franks’ (2014:49) article, Picard (2005) is quoted as warning that ‘the failure to focus on institutional strengthening in the first decade of non-racial government may have long-term implications for South Africa’.

A few years later, in 2002, Wolhuter (2006:136) reported that there were 364,369 South African teachers in service, with 20,381 teachers leaving service in one year. The key reasons for leaving service are displayed in the figure below.

Terminations of Teachers in Service in 2002 (Wolhuter, 2006:136)

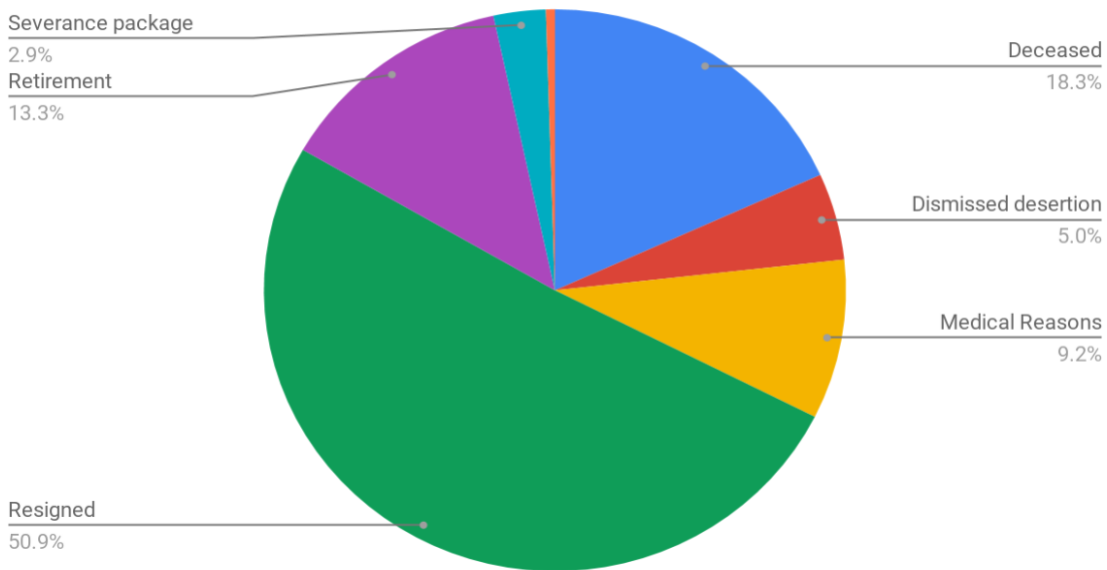


Figure 1: Terminations of teachers in service in 2002 (Wolhuter, 2006:136)

Resignations were widespread. While the VSP was not fully active, the number of teachers migrating overseas was considerably higher during this time (De Villiers, 2017). This significant drop in the numbers of teachers in service due to migration impacted the life cycle of qualifying pre-service to in-service teachers (Bertram et al., 2006; Franks, 2014; Sayed et al., 2016). It exacerbated an ongoing global problem of teacher turnover, an issue explored further in Chapter 3.

These early policy and curriculum reforms aimed at undoing the injustices and imbalances of the past had adverse effects on how teachers engaged with teaching (Chisholm, 2003:1). It included loss of skills and prestige and widespread uncertainty.

2.1.2 Imagined experience of Miriam

In her examination of the University of the Western Cape's Postgraduate Certificate in Education (PGCE) programme in 1999, Robinson sketches a lengthy but helpful persona experience of what it may have been like for teachers during all the governance changes in South Africa and this change's impact on their teaching.

Imagine a teacher; let's call her Miriam. She is a dedicated teacher who has taught for 10 years. In all that time her school has been racially exclusive, so that she has had pupils in her class who can speak the same languages and who come from similar backgrounds. She has been expected to be formal in her teaching and she has been able to use corporal punishment on those pupils who do not listen to her. Someone in the Department of Education has made sure she has received the syllabus, the textbooks, and the dates and format for the tests and exams. Her greatest achievement was to further her qualifications, for which she received a salary increase. No other teacher has ever watched her teach, and no teacher, inspector, principal or subject adviser has ever asked her for her opinion about teaching or about the school in general. Suddenly life changed.

The people who visit her from the Department of Education are different. Not only are they from one Department of Education instead of the former multitude of racially divided departments, but they have progressive ideas about education she is not used to hearing from her employers. Her pupils are from different racial and economic backgrounds and speak different home languages. She does know how to teach them.

The new curriculum demands that she teach using learner-centred or cooperative teaching methods. No-one has ever shown her how. If the pupils are unruly, she cannot cane them or she is the one who will be in trouble. She is told to do continuous assessment instead of regular tests. But what exactly is continuous assessment, and why should she do it? She is asked which textbooks she would like to order for her subject. She has never thought about this before and does not know how or what to choose. Her principal says there will be an appraisal process at school and she must give other teachers feedback about their teaching. What should she say? She must go to a meeting to discuss the Schools Act, where teachers will form part of the school's governing body. Never before has this been expected of her. She has never read policy documents or even known of their existence. There is tension at the school because of something called rationalisation and redeployment ['right-sizing' or 'teachers in excess']. Some teachers are leaving the school and new ones are coming. It all feels very uncertain. And she is not sure whether to study further as it is not clear if this will be recognised for salary purposes. Perhaps she should change her job? But to what? In a way it is all very exciting.

Miriam is happy that education is no longer divided on racial grounds and that schools are becoming less authoritarian and exam-driven than they were before. Miriam wants to do her best to contribute to building a new education system, but at the same time she feels overwhelmed. She just does not know where to begin.

(Robinson, 1999:192)

The extract describes how Miriam was suddenly uncertain about what was expected of her. Teachers were tasked to implement curricula that were unfamiliar in accessibility, content and pedagogical expectations. Robinson's (1999) account reflects the internal struggle of teachers during this transition of government: where there is a sense of less decision-making power in thought and action, not for lack of will but perhaps for lack of knowledge or familiarity. Jonathan Jansen predicted that this delicate situation would be further damaged through the new focus on 'learner-centred' curriculum reform known as Outcomes Based Education, which intended to spawn innovation, but instead served to 'undermine the already fragile learning environment in schools and classrooms of the new South Africa' (Jansen, 1998:323).

What Robinson's imagined teacher experience did not take into account was structural issues, such as classroom resources, class size and materials for learner-centred activities, or personal pressures, such as family demands since more time was needed for lesson preparation, economic ties to the job and the personal willingness to confront past injustices. Despite these gaps, Robinson's persona offers a powerful snapshot into teachers' uncertainties and confusion. A declining supply of teachers was inevitable. Miriam's response to this context may have been one of resignation; either from her teaching role or resignation from her motivation to teach¹.

Miriam's persona also raises a broader issue of the scholarship of teachers in new social contexts. For Miriam, *new* described the political shift in the country. For NQTs, *new* may describe their first classroom. In the context of this dissertation, if we imagine Miriam to be an NQT and a bursary holder, what would the account of her experience be? Like Miriam, NQTs may be new to how schools work and to the process of teaching. Robinson's extract can therefore also be used to explore the topic of this dissertation: how NQTs who *want* to teach may encounter challenges.

2.1.3 The Funza Lushaka Bursary Programme

In the context described above the South African government launched the Funza Lushaka Bursary Programme in 2007 as a national strategy to attract new entrants to teaching through comprehensive university funding while ensuring graduates teach in a public school. The programme was and still is intended to increase the supply of teachers and reduce teacher scarcity in South Africa (JET Education Services, 2016a:21).

The bursary was a response to a set of past events and interpretations on how to improve future outcomes in South Africa. In response to the gross inequality within teacher education and training programmes pre-1994, the new South African government worked to unify and

¹ Further research on the contextual influences and definitions of *teacher resignation* during this time would be a helpful addition to the scholarship of the teaching profession in South Africa.

centralise teacher education to improve the national quality of teachers (Departments of Basic Education and Higher Education and Training, 2011:19). The 1995 White Paper on Education and Training saw the newly elected democratic South African government taking a firm, revolutionary stance on national education and teacher education, justifying their redress of Education and Training through an integrated approach: 'education and training are each essential elements of human resource development' (Department of Education, 1995:9). One of the main goals the white paper recommended was to 'open the doors of learning and culture to all' (Department of Education, 1995:11).

In 2006, Former Minister of Education Naledi Pandor opened an address to the South African Democratic Teacher Union (SADTU) as follows: 'Teachers are the frontline in our defence against ignorance' (Pandor, 2006). Minister Pandor positioned teachers as the first point of influence to increase knowledge in our classrooms.

Minister Pandor's positioning of teachers in relation to the wider societal position of thought, education and knowledge encouraged the conversation on the role of the teacher in South Africa at the same time as the country's performance on large-scale evaluative testing and measurements became available for comparative benchmarking in the education sector. Around the time of national curriculum reform and the implementation of Curriculum 2005, South Africa was found to perform poorly on the benchmarks of mathematics and science. In the international arena of reading literacy, South African students also ranked below the international average and often in the last position (Mullis et al., 2007:70).

These findings raised serious concerns that South Africa would not be able to succeed in a 'rapidly changing and competitive technological world' unless it could 'develop and protect its capacity to produce well-qualified teachers' (Howie, n.d.). South Africa's poor performance in these testing mechanisms shone the spotlight on ineffective teaching education.

In this context, the *National Norms and Standards for School Funding 2007* Gazette stated that NSFAS would provide funds for young people 'who would otherwise have been deprived of a higher education' to study teaching at university, particularly allocating funds for priority subjects

based on need (Department of Education, 2007a:19). In the 2007/8 Budget Speech, Minister Pandor launched the Fundza Lushaka Bursary (as originally named) to provide 'R700 million for teacher bursaries over the next three years, the first R120 million of which has been fully committed for 3 000 student teachers in the Fundza Lushaka Bursary Programme' (Department of Basic Education, 2007).

The Funza Lushaka Bursary scheme was launched by the National Policy Framework for Teacher Education and Development in South Africa (Green, Adendorff and Mathebula, 2014:4). Minister Pandor committed to a focus on mathematics, science, technology (including ICT), indigenous languages, English and teaching in the foundation phase, stating: 'In 2007, we intend to focus on expanding success and enhancing quality in education practice, policy and our own administration' (Pandor, 2006).

In 2009, the historic Teacher Development Summit gave the bursary a further injection. The Summit brought together several stakeholders in South African education, including teacher unions, the South African Council for Educators, the Education Training and Development Practices Sector Education and Training Authority, the Education Labour Relations Council, the national Department of Education and the Higher Education South Africa – Education Deans' Forum. In response to the discussions and requests from the Teacher Development Summit, the Integrated Strategic Planning Framework for Teacher Education and Development in South Africa (2011-2025) presented the intention of moving towards solutions for the areas highlighted, one being attracting high-school leavers into the education sector. The bursary's budget therefore increased from R 893.9 million (2013/14) (Motshekga, 2013) to R 3.7 billion (2017/2018) (Department of National Treasury, 2018:4).

The 2017/2018 financial budget expanded to support teacher education across South Africa based on three principles on which the future of teacher education would be founded (emphasis my own):

- 1) Quality and equity – recognising teaching as a specialist, graduate profession with research and theory as its foundations to encourage the breaking down of inequalities and to create a community;
- 2) Affordability and access – to increase that new and existing teachers can have access to the education described in the first point, through the use of bursaries and support structures;
- 3) Coordination and integration – to maintain a relationship with the economic development of the nation, with the aims to build a united South Africa through the integration of all stakeholders in education and development.

(Departments of Basic Education and Higher Education and Training, 2011:23)

To satisfy these principles, the Department of Basic Education (DBE) has run a focused teacher recruitment programme called the Funza Lushaka Bursary Programme. As of 2018, the bursary scheme invites eligible South Africans to study a four-year Bachelor of Education (B.Ed.) or a PGCE after graduating with a three-year Bachelor's degree.

The promotion of affordability and access to teacher education aligned with early decisions in 1995. Salmon and Sayed (2016:45) present a clear summary of the bursary's noble goals:

A multi-year, service-lined bursar scheme of the national government that was originally implemented in 2007 to raise the number of newly qualified teachers entering schools to meet the teacher needs of marginalized schools, particularly in poor and rural areas, by offering full-cost bursaries to eligible students who enrol in special Initial Teacher Education (ITE) programmes (ibid).

2.1.4 JET assessment

Nine years after the launch and implementation of the bursary, the Joint Education Trust (JET) was tasked with compiling an independent Programme Implementation Evaluation Report (2016). Besides this report, there is little to no investigative or evaluative information reported on the bursary.

JET reported a constraint in marketing the bursary in rural areas, mentioning that 'marketing measures are hampered by budgetary constraints and insufficient human resources' (JET Education Services, 2016b:147). Despite the many socio-economic barriers impacting internet

access, 68.01% of South African social media users across all devices between 2017 to May 2018 used Facebook, far above any other social media site (StatCounter Global Stats, 2018). Facebook stands as an alternative point of communication through Facebook pages. While there is a NSFAS and Funza Lushaka page (with the last update in August 2017), the most active and responsive page is Funza Lushaka Kwa-Zulu Natal, where there is interaction with strong public interest, as in the figure below.



Figure 2: Screenshot from Funza Lushaka Kwa-Zulu Natal Facebook page (Reference)

Therefore, Facebook could be a reasonable route for cost-effective marketing. Not marketing the bursary sufficiently in rural areas therefore rather suggests a lesser focus on the needs of the applicant.

The JET report also made the following four analyses:

a) In terms of programme effectiveness, JET describes the planning of the bursary as ‘ad hoc and reactive’; the ‘alignment between government funding and planning cycles’ needed more cohesion and have more intentional forecasting (JET Education Services, 2016b:34). Under the same section, the report states the ‘absence of a tracking mechanism’ returns unknown results (ibid). In other words, at the time of this report, the bursary could track who were its beneficiaries but had no account of the number of bursary graduates who ‘fulfilled their service obligation’ (JET Education Services, 2016a:33).

b) In terms of programme efficiency related to recruitment of applicants, JET describes how bursary applicants selected their priority subjects listed on the website based on national needs instead of provincial needs (JET Education Services, 2016b:35). In other words, recipients of the bursary are being selected against a national framework of priority subjects despite what the needs may be for provincial or district-based schools.

c) In terms of programme efficiency related to the selection of applicants, JET mentions a ‘refund policy’, which is, in fact, refunding students when university fees are decreased and not sending funds to NSFAS (JET Education Services, 2016b:38). When considered on a national basis, this reallocation of funds presents major implications for national spending and budgeting.

d) In terms of programme efficiency related to the placement of graduates, JET documented it as ineffective due to organisational issues between the Provincial Education Department (PED) and DBE (JET Education Services, 2016a:217). There is no system to track when bursary applicants change the course of their degrees, potentially altering their teaching subjects (JET Education Services, 2016a:218). The report presents data indicating ‘many [of] the bursary graduates [are]

teaching in quintile² 4 and 5 schools', despite the overall intention of the bursary to target the poorest (quintile 1-3) schools (JET Education Services, 2016b:40).

JET's findings will enhance the (1) monitoring and evaluation and (2) practical implementation of the goals of the bursary. However, while JET captured the detail of the bursary's programme theory, it failed to capture the human experience of the teacher behind the data. The interest of this minor dissertation is, therefore, to engage with the effects of the bursary on its recipients when they become NQTs.

² For more on quintiles, see National Norms and Standards for School Funding (2007b:8).

This section raises the question of Rizvi and Lingard (2010): *why do we study policy?* (Ball, 1994, 2003; Rizvi & Lingard, 2010; Slee & Stambach, 2010; Shahjahan, 2011). I present the theoretical stance of this study and discuss the concepts and terms I will use in the analysis of the discourse(s) of the bursary's Agreement Form in Chapter 5. I combine Foucault's (1975) notions of embedded power relations with concepts in the principal-agent theory of asymmetrical exchange, Chatman's (1978) work on discourse and the how of expressions, and Foucault's (1994) interrogations of power and discourse presents the backdrop to explore how the discourse(s) in the Agreement Form exerts power over applicants.

2.2. Theoretical Context

It is worth noting the Agreement form can be analysed as a policy text as the Agreement form carries the same function as discussed below. When analysing the text as policy texts, Ball (1994:16) positions policy texts as 'the product of compromises at various stages' and describes policy as 'changing, always in a state of "becoming"'. The compromises which inform the creation of policy texts are never completed. When exploring the field of policy, it is near to impossible *not* to come across Rizvi and Lingard (2010). Slee and Stambach (2010:353) describe Rizvi and Lingard's work as 'necessarily nuanced and meticulously forensic in order to deal with the complex and shifting terrain it seeks to describe, analyse and explain'. Hursh (2011:198) states that Rizvi and Lingard 'analyze past and present approaches to policy analysis, showing how most approaches fail to problematize their assumptions and values'. In their ability to deal with shifting terrain, Shahjahan (2011:485) comments, 'the authors articulate various ways of critically analyzing education policy by drawing insights from a range of theoretical and methodological traditions includ[ing] critical theory, poststructuralism, feminism, postcolonialism, and critical discourse analysis'.

I highlight three perspectives on the importance of policy texts through Rizvi and Lingard's (2010) theoretical framework(s). Firstly, Rizvi and Lingard (2010:4) suggest public policy texts 'express both ends and means designed to steer the actions of behaviour and people'. The use of the word *steer* suggests the intention of the policy is the driving force that shifts and influences other agents to change. Deeper in this assertion is how policy texts are designed to change and

influence behaviour *and* people. A separation emerges between behaviour (including events, institutions and government decisions) and people (citizens, non-citizens, majors, minors).

Secondly, from an anthropological perspective, Rizvi and Lingard (2010:5) suggest an important question might be ‘what do people do in the name of policy?’ This position allows for wider consideration of what and how policy texts informs people and institutions’ behaviour, decisions and intentions. The phrase ‘in the name of’ suggests policy texts decisions may be made as an honourable reason with only honourable intentions but result in behaviour and outcomes that run counter to these intentions.

Thirdly, Considine (1994) (in Rizvi and Lingard, 2010:7) assert, ‘a public policy is an action which employs governmental authority to commit resources in support of a preferred value’. Values are a core pillar of education policy. Here it is important to introduce some scholarship on the problem of teacher education and retention, which was the focus of the Funza Lushaka policy programme.

2.2.1 Teacher turnover, retention and recruitment

Scholarship on teacher turnover tends to focus on the stressful nature of the job (Näring, Briët and Brouwers, 2006), lack of support from staff, lack of opportunities to participate in decision-making (Cochran-Smith, 2004) and the concept of emotional labour and emotional exhaustion (Richardson et al., 2008).

Teaching can be described as a high-stress profession (Näring, Briët and Brouwers, 2006:304). NQTs face challenges around the amount of time spent on administration, lack of support from staff, lack of mentoring and lack of support from peers (Kaufman and Al-Bataineh, 2011:252). In studies of new teachers’ experiences, complaints include job dissatisfaction, student discipline problems, lack of support and little opportunity to participate in decision-making (Cochran-Smith, 2004:388).

Cochran-Smith (2004:390) reminds us that ‘teacher retention is a multi-dimensional problem’ and also suggests the importance of a generational perspective in exploring new teachers’

reasons for leaving the profession. Cochran-Smith argues that there is a difference between older generations of teachers and new entrants to the profession, as outlined in Table 2.

Table 2: Why different generations of teachers entered the profession, according to Cochran-Smith (2004:389)

Older generation (e.g. before 1994) entered the profession because:	The newer generation (after 1994) sought:
Teaching was a respected profession.	Reasonable pay for the work produced.
The profession was more altruistic which (somewhat) justified the salary bracket.	Opportunities to advance in the profession.
Teachers expected to stay in the classroom.	Opportunities to collaborate with colleagues in a supportive environment.

Although a helpful framework, Cochran-Smith’s positioning of older versus newer generations of teachers is constrained on a binary with no space for the continuum of development and growth, nor is there space for exploring periodic influences. Yet this contrast points to motivations and means of communication. It suggests that the newer generations of teachers likely considered their growth through their job, whereas older generations wanted to teach within the classroom only. This simple binary lays the foundation for exploring the importance of communication in schools.

Communication and emotion are key concepts in understanding teacher turnover. Coultas (2007:147) explores the role of talking in learning and managing complex classrooms and asserts that ‘a good school is becoming more and more defined by results, not by relationships’. The increasing focus on standardised curricula and standardised testing can come at a cost to relationships among school stakeholders. Yet Coultas (2007:2) notes that the role of talking and listening in classrooms allows students to engage with their learning on a deeper, personal level. Talking is a classroom resource to decrease resistance and improve willingness to share and learn. Willingness to learn depends on the strength and directions of communication channels. It is as true in school management relationships as in teacher-student relationships.

Richardson et al. (2008:11) present the concept of *communication symmetry*, which describes the 'willingness of an organisation to listen and respond to the concerns and interests of its employees'. The result of the willingness to listen would result in both parties feeling 'heard' and 'valued'. In a school context, Richardson et al. assert that when teachers work in environments of asymmetrical communication where the teacher looks to communicate concerns, send and receive feedback or ideas but is met with no communication, feelings of 'isolation, burnout and turnover may occur' (ibid).

An important aspect of teaching turnover is raised through Hochschild's (1979, 1983) work on emotional labour. Teachers are required to express or communicate the 'proper' emotion back to their target (Richardson et al., 2008:12). Here, target refers to the *teaching group* the people or students with which the teacher engages. In other words, emotional labour speaks to the process where an individual demonstrates what is believed to be the needed response, which may be far from what the individual would truly respond.

I would add that teachers demonstrate emotional labour both professionally and pedagogically. Pedagogical emotional labour can be born from mixed-learning abilities in classrooms, class size, curriculum reform to the gentrification of cities. A teacher, to some degree, should express and communicate proper emotion to the target, yet faking these emotions is taxing (Näring, Briët and Brouwers, 2006:303). When exploring professional emotional labour and pedagogical emotional labour, teachers may feel growing pressures to be silent in their desire to communicate concerns, feedback or ideas to their colleagues. Long periods of emotional labour leads to emotional exhaustion, feelings of 'fatigue, frustration or being unable to face another day on the job' (Richardson et al., 2008:13), which leads to high teacher turnover.

Boe et al. (2008:7) assert that teacher turnover, or teachers who choose to leave the profession, contributes to a teacher shortage. Even though there may be enough teachers in supply (graduates with teacher qualifications to practice teaching), not enough teachers are retained to meet the demand. It suggests that the problem of teacher turnover cannot only be addressed by

the quantity of teachers being educated but also by the content and quality of how education prepares teachers for the job.

Hancock (2003:168) notes a relationship between pre-service teacher training and the future success of teacher retention. If pre-service training programmes were adequate, new teachers would be better prepared for the requirements of the profession and overcome these challenges (ibid). Hancock (2003:168) further suggests that the moment which 'causes' a teacher to re-evaluate their career choice is symptomatic of the extent of the teacher's ability to overcome the challenges of teaching. This 'ability' suggests that teachers require a larger personal capacity to function amidst the demands of teaching, prompting the question of how this capacity can be created during teacher education.

Hansen (1995:3) argues that vocational work is 'work that has social meaning and value' and that it stems from *within* the teacher. The feeling that work is vocational cannot be 'applied' or 'possessed' but is the external realisation of inner motivations. It suggests that the process of teacher education complements the internal motivation of the new teacher, thus narrowing the pool of 'called' teachers to the profession.

Contrasting Hansen, Morrow (2007:69) argues that teacher education is the enabler of the capacity to be a teacher: it 'enabl[es] someone to become more competent in the professional practice of organising systematic learning'. Even though Morrow (2007:70) agrees that commitment is important, it should be coupled with competence in achieving and caring about the ideals of learning to teach.

The global teaching profession not only faces challenges in retaining a younger cohort of teachers but also in recruiting them (JET Education Services, 2016a:27). Young people have been exposed to a range of professions with attractive benefits. While Johnson and Kardos (2008:46) describe a US context, many of these observations are relevant in South Africa:

- 'All career options are open to all young people.'
- 'Many professions seek the same people who were previously excluded from teaching.'

- ‘Other professions offer more attractive and comfortable work environments.’
- ‘Recruits can expect to earn much more on entry than they would in teaching.’
- ‘They can anticipate far higher wages over time than the standard salary scale teaching promises.’
- ‘The prospect of high pay in other lines of work also brings a level of status that classroom teaching lacks.’
- ‘Other fields offer a job candidate the possibility of expanded responsibility and recognition within a relatively short time.’

These observations point to practical challenges of encouraging the teaching profession as a viable option for young people.

2.2.2 Critical discourse analysis (CDA)

Chatman (1978) (in Berger, 2016:5) positions *discourse* as the ‘how the story is told’ as opposed to ‘what’ is told. Rizvi and Lingard (2010:14) remind us that ‘texts and indeed discourses do not exist in material vacuums. Rather, they are located in specific material realities and cultural formations’ (Prior, 2012). Against the backdrop of South Africa’s historical and thus cultural formations, unequal power structures exist. Building on the social justice narratives of Mbembe (1992) and Widdowson (1998), I draw on Foucault’s social theories around *embedded power* to present the analysis of the discourse(s) in the Agreement Form.

As described by Fairclough (1989:22), language is a form of social practice. The ways in which we communicate through spoken or written language carries traditions and practices which help shape society. CDA allows us to focus on relations between discourse and other social elements, such as power, ideologies, institutions, social identities, etc. (Fairclough, 2013:178). It makes possible a descriptive interrogation of existing structures of inequality and unequal power relations. Fairclough (1989:110) acknowledges this process of textual analysis is not a blueprint for analysis but the beginning of exploring how language is used to shape wider society, particularly through what may be implied: ‘(I)n analysing texts, one’s focus is constantly

alternating between what is 'there' in the text, and the discourse type(s) which the text is drawing upon'.

Fairclough (1989:112) presents a definition of 'types of value that formal features may have': 'experiential...'. This study focuses on Fairclough's definition of experiential values. Fairclough positions experiential values as those 'which the text producers experience of the natural world [...] Experiential value is to do with contents, knowledge and beliefs' (ibid.). He (1989:115) posits that some words are 'ideologically contested', serving the argument that the particular way language is represented builds a particular reality.

Fairclough (1989:25) offers a three-box model of CDA, as illustrated in the figure below.

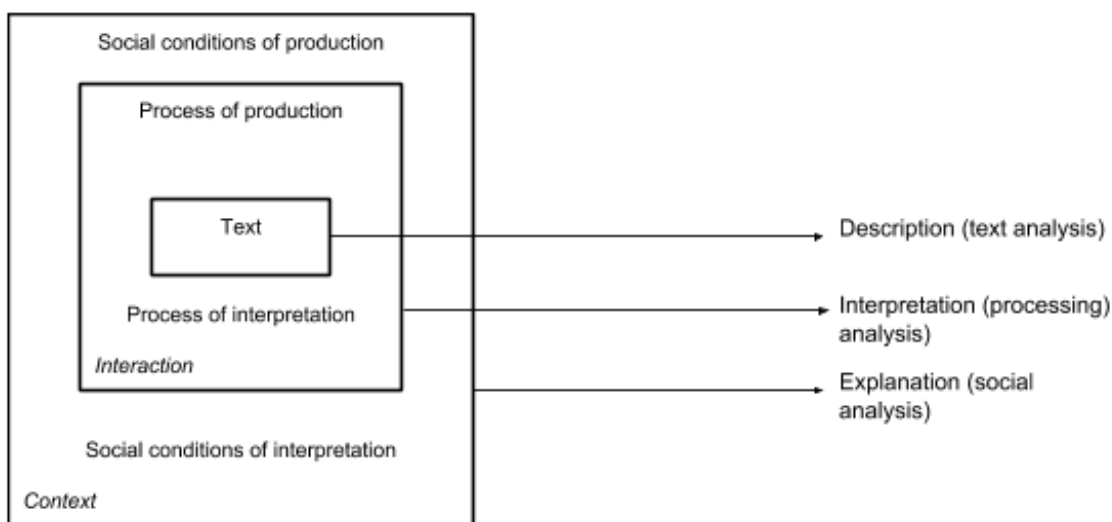


Figure 3: Fairclough's (1989:25) three box model

Janks' (1997) offers a clear description of Fairclough's three box model, as portrayed in Table 3.

Table 3: Janks' (1997) description of Fairclough's (1989) three box model

Text analysis: <i>description</i>	The object of analysis (including verbal, visual or verbal and visual texts)
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Processing analysis: <i>interpretation</i>	The processes by means of which the object is produced and received (writing/speaking/designing and reading/listening/viewing) by human subjects
Social analysis: <i>explanation</i>	The socio-historical conditions which govern this process

CDA allows researchers to pause and focus their attention on existing texts which carry implicit relations to the wider context. Fairclough (1989:2) terms this process – where there is an unequal shift of power in language and use of language – as a power struggle. The role of language is to communicate despite muddy waters; individuals and institutions constantly adapt to be understood or make others understand.

Foucault (1975:172) points to the notion of embeddedness, which happens when an architecture ‘is no longer built to be seen’ but continues to ‘operate to transform individuals’. Embeddedness is positioned as not overt nor taking up obvious space. Instead, embeddedness points towards what is not said and how it may be said and is received. Foucault (1975:172) describes ‘embedding’ as deeply complex:

A whole problematic then develops: that of an architecture that is no longer built simply to be seen [...] in more general terms, an architecture that would operate to transform individuals: to act on those it shelters, to provide a hold on their conduct, to carry the effects of power right to them, to make it possible to know them, to alter them.

It is important to note here that power relations are fluid. The relationships may be either formal or informal, legal or social, with differing degrees of agency. Cooper (2005) echoes Ball (2003): ‘everything is relative to everything else, nothing is complete in itself but is part of the continuous movement and interaction between things’ (in Bigo, 2018:124).

This mutual relationship between the parties is echoed in principal-agent theory, which reminds us that neither participant could complete the task without the other. The nature of this

relationship through the eyes of the principal (the bursary funder, in the context of this study) is infused with uncertainty about whether the agent (the bursary applicant) will complete their end of the deal. Principal-agent theory in its basic form refers to a situation in which ‘two actors are involved in an exchange of resources’ in the attempt to ‘maximise their preferences that are ordered to their priorities’ (Braun and Guston, 2003:303). Within this theory is the assumption that two rational actors are exchanging resources.

Principal-agent theory draws attention to two forms of knowledge asymmetry, namely moral hazard and adverse selection (Braun and Guston, 2003:304). Moral hazard suggests that the principal is not certain of the quality of the contract satisfaction. (For example, in this study: will they perform adequately at university? Will they take up teaching posts?). Adverse selection refers to the lack of information the principal has of the abilities of the agent to complete their end of the deal. (For example, in this study: will they remain in teaching posts as stipulated? Will they provide quality teaching in schools?) These two forms of knowledge asymmetry contain no exploration of the agent’s morality or ability: the uncertainty is wholly contained by the principal actor, which may be the easiest to measure.

Bigo’s (2018:124) work on *Silence and Creativity* points to how an individual may be hidden and silenced and how this process may take physical form. This study uses Bigo (2018) to extend or nuance CDA to include a layer of form and expression through opportunities for silence. . Exploring silence is important not only because it is about the absence of speaking or sound, but, according to Bigo, even more about the absence of self. It offers the opportunity to explore the absence and presence of the bursary applicant in the discourse(s) of the Agreement Form to highlight the spaces in which the bursary applicant is silent. The silence of the bursary applicant in the document, according to Foucault, presents its own discourse and, with it, carries its own voice.

CHAPTER 3: METHODOLOGY

This research methodology is guided by the two central research questions: (1) how does the Funza Lushaka Bursary Agreement Form impact bursary holders? and (2) to what extent does the discourse(s) used in the Agreement Form control and exert power over its applicants? This chapter presents this minor dissertation's research approach as informed by the contextual and theoretical stances introduced in the previous chapters.

3.1 The deductive approach of critical discourse analysis

This minor dissertation uses the deductive approach of CDA that 'focus[es] on cultural meanings attached to people, artefacts, events and experiences' (Eriksson and Kovalainen, 2011:227). CDA's inclusion of the person in the context of the unit of analysis separates it from other methods of analysis, making it a useful approach for this minor dissertation. Secondly, it aims to be 'committed to political interventions and social change by raising people's awareness about specific issues' (Siegel, 2018:524), crucial to this minor dissertation's focus of raising awareness of the possible impact of the bursary on its recipients when they become NQTs.

The analysis uses each of these boxes in turn. I extract direct snippets from the relevant text and use square brackets and bold font to draw attention to the points of interest. Discourse analysis is also as much about what is unsaid as what is said. Fairclough presents four levels of these unsaid assumptions, which I simplify and summarise in Table 4. The focus of this minor dissertation is on the fourth level because of the historical and social implications of the Agreement Form.

Table 4: Fairclough's (1989:143) four levels within the interpretation box

1. Surface of utterance	Sounds(s) or mark(s) on paper recognised between people
2. Meaning of utterance	The meaning(s) of these sounds or marks on paper
3. Local coherence	Interconnected meanings
4. Text structure and 'point'	Global interconnectedness

3.2 Qualitative approach

This research methodology is qualitative. ‘Qualitative research is a research strategy that usually emphasizes words rather than quantification in the collection and analysis of data. (Bryman 2008a: 366). Sandelowski (2004:893) positions qualitative research as ‘an umbrella term for an array of attitudes towards and strategies for conducting inquiry that are aimed at discovering how human beings understand, experience, interpret, and produce the social world.’

The benefit of employing qualitative research in this study is to collect and analyse data which would discover how bursary holders experience their social world. Whereas *quantitative* research would employ ‘sampling, measuring and procedures for causal inference’ (Zyphur & Pierides, 2017:7). While there is merit to quantitative research in providing representative findings based on samples, this minor dissertation seeks depth of analysis and its produced in-depth data.

3.3 The position of the researcher

For a qualitative study guided by social justice, it may be obvious to take the participant-observation approach where: ‘the researcher takes part in everyday activities related to an areas of social life in order to study an aspect of that life through the observation of events in their natural contexts’ (McKechnie, 2012:599). A limitation to this method, however, is that the participant-observation approach holds the researcher separate from the research. I argue that the narrative of the researcher is more powerful to weave *into* the research. The goal is not objectivity.

This shifting of responsibility liberates the researcher from the participant-observer role to being included as part of the research, releasing the position as a researcher and instead be positioned as both a person and researcher. Tufford and Newman (2010:81) position the method of bracketing where the researcher is involved across all phases of the project: ‘(the researcher’s)

subjective endeavour entails the inevitable transmission of assumptions, values, interests, emotions and theories (...) within and across the research project’.

My positionality as researcher is an important part of the research methodology. Burton (2011) provides the space for *positionality* and how it informs the depth and breadth of research. In this section, I discuss how I am situated in relation to this knowledge, both from personal experience (Tufford and Newman, 2010; Relles, 2016) and academically in what I am aiming to achieve. My subjective positionality is a strength, as long as it is acknowledged through reflexivity and transparency. The two go hand in hand, ‘since without transparency, reflexivity is undermined; at the same time, reflexivity obviously promotes transparency’ (Hiles, 2012:891). This research approach encourages the honest participation of the researcher (me) with its subject (bursary Agreement Form) within the context of the need of the research. The consideration and examination of decisions made at each stage of the research process encouraged me to consider how my presence influences the research findings (Saumure & Given, 2012:796).

In bringing reflexivity to my positionality, I draw on Dowling (2012:748), who notes that ‘reflexivity is not a straightforward endeavor. It requires consideration and examination of decisions made at each stage of the research process, and the extent to which such examination is adopted depends on the methodology adopted’ (2012:749). My experiences as an NQT bursary holder cannot (and should not) stand separately to both the research approach and the presentation of its results.

The impact of my experience presents the opportunity for the theme of ‘naming one’s own reality’ to emerge (Milner, 2007:391). This naming method weaves the experience of the researcher into the researched subject, combining a single reality with academic expression. The power of this research is laying the foundations of a particular approach where ‘research questions derive research methods’ (Teddlie and Tashakkori, 2009:283). Tufford and Newman (2010:80) position qualitative research as ‘a means to harness and explore the lived experience of the participant’.

However, I also draw inspiration from Robinson's (1999) use of the persona of Miriam to explore the way policy is experienced by real individuals. I provide the persona of Mpho to describe the experience in a contemporary context.

3.4 Data sources

The primary data source for this study is the Funza Lushaka Bursary Agreement Form. I focus deeply on this document, its discourse(s) and how it impacts the bursary applicant at different times. However, it is also placed in the context of the processes that surround it to acknowledge both the context in which the Agreement Form functions and how NQTs experience it.

3.5 Limitations of the research design

The main limitation of this research design is that the perspective presented relies heavily on my own interpretation and experience and does not incorporate the experiences of other bursary holders. The research design limits the opportunity for a wider scope of interaction and instead allows for a nuanced personal perspective which a wider-scale study may lose.

3.6 Rigour, ethics and funding

I have positioned this methodology with complete transparency around my role as the researcher in relation to the research topic.

There was no need for ethical approval for this minor dissertation as it focused solely on the documentation as the primary unit of analysis in the field of discourse analysis. However, my own ethics, as both the researcher and former bursary holder, was crucial to this study. Regular meetings with my supervisors where I sought their perspective mitigated the risk of conflating my perspective of the bursary with the discourse(s) of the Agreement Form and how it can be interpreted.

This research did not receive external funding.

CHAPTER 4: SURFACING THE DISCURSIVE WORLDS OF THE FUNZA LUSHAKA BURSARY

This chapter analyses the discourse(s) used in the Funza Lushaka Bursary Agreement Form with a focus on how the discourse(s) in the document exerts power over its applicants. I first apply Fairclough's three box model of CDA, namely textual, processing and social analysis. Secondly, I apply Foucault's frameworks of embedded power and use of time to analyse the bursary, first by analysing the Agreement Form and then through the imagined experience of Mpho.

4.1. Fairclough's three box model

4.1.1 Box one: Description (text analysis)

According to Janks' (1997) description of Fairclough's (1989) three box model, text analysis involves a description of the object of analysis, including verbal, visual or verbal and visual texts. The object of analysis for this study is the Funza Lushaka Bursary Agreement Form.

Firstly, it must be noted that I had trouble gaining access to the most recent version of the document to perform this analysis. Only an outdated version of the contract was available online. I emailed the Director of ITE at the DBE, Gerrit Coetzee, requesting the 2018 policy document for this minor dissertation, and it was promptly emailed in return.

The fact that the most recent version of the document is not readily available has three implications: (1) potential applicants may engage with outdated policy, and (2) parents, researchers or any stakeholder in education would engage with a different concept of the bursary and (3) potential applicants may make decisions based on outdated information directly linked to their employment after qualifying.

The Department of Basic Education (DBE) makes explicit the expectation when undertaking the bursary, bursary holders may be placed in any public school across South Africa. This study refers to this time as "placement period". There is a time limit made explicit for this placement period, during which the bursary holder may be placed at a public school. However there are significant

discrepancies between the details of this placement period. For example, the 2013 document indicates that the service period is sixty (60) days, whereas the 2018 document indicates it is ninety days (90).

This study recommends that the bursary administrators regularly check that the latest document and accurate accompanying information is made available via all channels, especially the internet.

An overall observation of the 2018 Agreement Form is that it is 10 pages in length and available in English. Its title is 'Bursary Agreement for Funza Lushaka', and it stipulates that it is to be read in conjunction with the Implementation Protocol in terms of the Intergovernmental Relations Framework Act 2005 (No. 13 of 2005). This Act mentioned is not attached to the Agreement Form but is only referred to. The document also refers to the following Acts:

- a) Section 27 of the National Student Financial Student Aid Scheme (No. 56 of 1999) ("the NSFAS Act")
- b) Employment of Educators Act (No. 76 of 1998)
- c) Section 24 & 26 & 40 & 103(5) & 123 of the National Credit Act (NCA) (No. 34 of 2005)
- d) Implementation Protocol in terms of the Intergovernmental Relations Framework Act 2005 (No. 13 of 2005)

The Agreement Form provides the legal specifics and legal expectations around the bursary, facilitates the collection of particulars of the Student (e.g. demographic details, residential address), and stipulates scenarios for defaulters of the bursary. I position this document to carry two functions: (1) to collect the personal details of the Student and (2) to stand as a Agreement Form between NSFAS and the Student in the case that any of the conditions of the bursary are not met, and the bursary is converted into a loan. To apply for the bursary, the Agreement Form must be printed and signed by the University and the Student.

Fairclough's (1989:112) framework positions experiential values as 'which text producers experience of the natural world or which is represented'. Fairclough (1989:115) posits that some

words are ‘ideologically contested’. In the Agreement Form, certain words used by the text producers exemplify their experiential values words on the assumed belief that all bursary applicants carry a particular worldview and knowledge base which mirrors that of the text producer.

The Agreement Form is produced by a branch of the DBE and NSFAS, which I refer hereon to as the Agreement Form’s text producers. The document is largely written using formal words, consistent with how governmental and legal documents are written. Formal words present a distant, less personal and authoritative tone. The lack of informality creates distance between the participants of the document, expanding the space between the bursary applicant and the bursary provider.

The Agreement Form also focuses on the expression of what bursary applicants should *not* do while supported by the bursary. The sentences and phrases are written largely in the negative where they refer to the behaviour or response of the bursary applicant. Predicated by an ‘if’, the negative expression is implied through the use of words such as ‘failure’, ‘fail’ and ‘does not’. For example:

4.1 [If] in the opinion of NSFAS the Student **does not** complete a placement request form as expected in terms of this contract [...]

14.2 [If] the Student **fails** to notify NSFAS in the manner [...] the Student will be deemed to be **failing** to make repayments [...]

(NSFAS, 2018:5, 8; parenthesis and bold format my own)

The use of negative language positions the bursary applicant to participate in what I term an assumed deficit model. An assumed deficit model functions on the expression of what is not achieved and negates any aspect of progress. In other words, the bursary applicant’s acceptance of this document is guided through acceptance only of what they cannot and should not do; they are engaging in the responsibility for their inability to meet expectation versus what they can and

should do. The assumed deficit model speaks to Foucault's arguments on imposed power and control: negating the role of the individual.

This lack of any possibility outside of what is negated from the individual is clearly outlined on the first page of the policy document:

Placement cannot be deferred for any reason. For example, bursars who complete their initial qualification cannot defer placement in order to continue study in an honours program (NSFAS, 2018:1)

The use of negative sentence structure and formal tone positions the bursary applicant with little room to engage with either further academic study or contextually valid divergence from what is outlined in the document. For example, the section on conversion of the bursary into a loan reads, "The Bursary will convert to a Loan if in the opinion of NSFAS the Student [...]" (NSFAS, 2018:5). The rest of this section describes six scenarios in which the conversion to a loan would occur. The extract's sentence structure contains a particular experiential value embedded in 'grammatical forms of a language code happenings, or relationships' (Fairclough, 1989:120). The grammatical form of the language used in this extract can be decoded to reveal embedded wider relationships: the receiver of this document (the bursary applicant) bears little influence in the method of the conversion into a loan.

Fairclough questions the presence of words that *are ideologically contested*. *Ideology* in this framework is positioned as common-sense assumptions, presented and then interpreted. Ideologically contested words and phrases are found throughout the text. In this section, I quote some examples of ideologically contested words from the first page of the Agreement Form. The first page clearly outlines the assumed positions between the bursary and the bursary applicant (bold denotes the assumed position of the text producer):

The Department of Basic Education (DBE) **has established** the Funza Lushaka Bursary Programme to attract **able and committed men and women** into teaching by providing them with a bursary **to enable them** to qualify as teachers in priority areas of learning. (NSFAS, 2018:1, bold format my own)

Fairclough (2013:11) asserts that ‘what is ‘said’ in a text always rests upon ‘unsaid’ assumptions, so part of the analysis of texts is trying to identify what is assumed’. The text producer assumes the position of authority through the words ‘has established’, ‘by providing’ and ‘to enable them’. These phrases rest upon the unsaid assumptions that (1) the bursary is needed in the teaching profession (‘has established’); (2) the bursary is the distributor (‘by providing’); and (3) the text producer knows what the bursary applicant requires to become a teacher (‘to enable them’), in an assumed, but not made explicit, specific role within subject areas (‘in priority areas of learning’).

In the initial paragraph of the Agreement Form, the bursary applicant is humanised in being assumed to be ‘able and committed’. The assumption held about the bursary applicant is that they would have the means to teach and would be purposeful in their teaching career. The unsaid assumptions suggest that the bursary provider, at its own decision, will provide the platform for men and women who are ‘able and committed’ but would then not be involved in any further aspects of the bursary applicant. Given that this paragraph is the only area where the applicant is humanised, and that rest of the document strongly outlines the legalities of the contract, there is little room for a different interpretation, using Fairclough’s first box framework.

The second paragraph provides further evidence of ideologically contested words and common-sense assumptions:

In return recipients will be placed by provincial education departments to teach in a public school in which a teacher is needed, thereby repaying the nation in service for the benefit of their higher education. Bursars cannot choose where they will be placed. Bursars can be placed anywhere in the province, or in the country. (NSFAS, 2018:1)

While any assumed exchange can be presented in different ways, this exchange of financial support for service is expressed in this particular form. Fairclough’s (1989:116) assessment of relations between words includes synonymy (where words have similar meaning), hyponymy (the meaning of one word is included within the meaning of another word) and antonymy (the meaning of one word is incompatible with the meaning of another).

‘Will be placed’ and ‘cannot choose where they will be placed’ are examples of synonymy and hyponymy. The absence of choice in the placement process is embedded with the same meaning using different word phrases. The bursary applicant is reminded twice within one paragraph that their undertaking of the bursary’s support will be framed within its decision on where they teach on qualifying as a teacher.

‘Recipients’ and ‘benefit of their higher education’ are examples of antonymy in the assumed hierarchy between the bursary applicant and the bursary. The meanings of words that are incompatible with each other here are shown in that ‘recipients’ simply describes the bursary applicant’s role of receiving while the ‘benefit of their higher education’ suggests that the support received from the bursary is for their gain. In contrast, ‘In return’ and ‘repaying’ express an ideological assumption: ‘in return’ assumes the bursary applicant is to reciprocate through ‘payment of service’, reciprocating through their behaviour as a qualified teacher.

The third paragraph of the same page reads:

Each year of service will repay one full-time year of bursary-assisted study. The bursar is obliged to take up placement immediately on completion of the initial teaching qualification. (NSFAS, 2018:1)

Fairclough (1989:62,74) presents the framework of *rewording* as ‘an existent, dominant, and naturalised wording’ and ‘what may be assumed to follow from what has been said, what is implied by what has been said’. Fairclough (1989:63) also presents the framework of *overwording* as a ‘preoccupation with some aspect of reality which may indicate that it is a focus of ideological struggle’. In the third paragraph quoted above, the *rewording* is not obvious unless read in relation to the previous paragraphs, but the assumption of what has been said is clear: for every year of financial support, the bursary applicant will be expected to teach its equivalent. *Overwording* is shown in that every bursary applicant will *immediately* be placed and teach on completion of their qualification.

Within Fairclough’s (1989:120) framework of experiential values, these words speak to ‘grammatical forms of a language code happenings or relationships’. The decoded relationship

between the bursary provider and the applicant is one of giver and receiver, with little room for applicant response, allowing the bursary provider to have increased room for voice and lesser so for the applicant.

4.1.2 Box two: Interpretation (processing analysis)

Fairclough (1989:140) asserts that discourse analysis cannot only look at the text in isolation. A text houses how discourse can be interpreted through the lens of individuals and society, in what Fairclough terms the processing analysis. Processing analysis constitutes the second box of Fairclough's theory, termed interpretation (processing analysis).

Fairclough introduces the second box, interpretation (processing analysis), as resting on the principle of description (text analysis). To accommodate the social context of discourse, Fairclough illuminates how discourse processes rely on background assumptions. The interpretation box of Fairclough's (2003:11) three box model explores the relationship between text, its social structures and what is said and unsaid: 'What is 'said' in a text always rests upon 'unsaid' assumptions, so part of the analysis of texts is trying to identify what is assumed'.

Unsaid assumptions could also be described as background assumptions (Fairclough, 1989), quiet in their existence but with a deep impact on how the text is produced and received. For example, when the document has recognisable marks of paper, and the meanings are reasonably understood, this production carries implications for its reception: does the applicant have the interconnected meanings or local coherence of the text? Does the applicant have scope to engage with the global interconnectedness or text structure and point of their engagement with this text? Asking these questions points towards the root of the processing analysis box: the embedded values which carry power based on its social context. The production and reception of text are refereed by social context and embedded values (Fairclough, 1989:140). Embedded values, unsaid or said, carry particular power relations between the receiver and producer of the text (description).

The power relations in the social context for the Funza Lushaka Bursary involves a trinity of stakeholders: the bursary, the university and the bursary applicant, as displayed in the figure below.

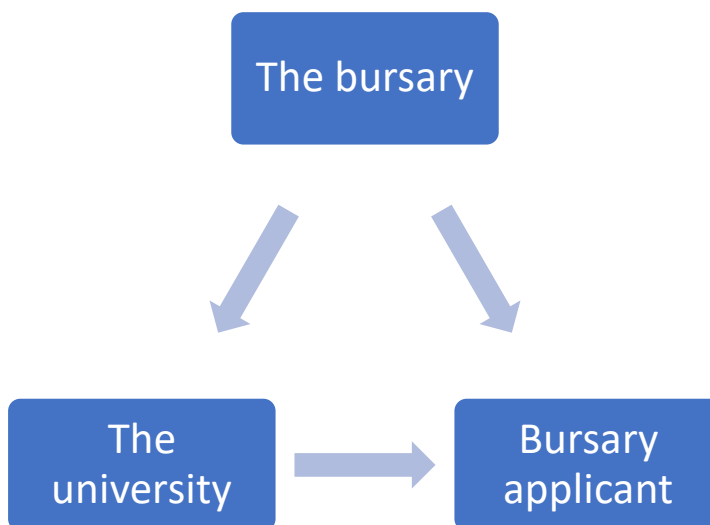


Figure 4: Power relations between stakeholders of the bursary

The figure above draws attention to the background assumptions informed by the social context which happen during the rollout of the bursary. To summarise, the DBE, through NSFAS (as the body which allocates the monies) allocates the funding to the university. The university then manages the allocation of funds to applicants, which includes the paperwork and signing the Agreement Form. The unsaid assumptions in this relation are that the university represents the

bursary and all it stands for. How this policy is literally received is in the form of a contractual document between the applicant and the DBE, witnessed by the university.

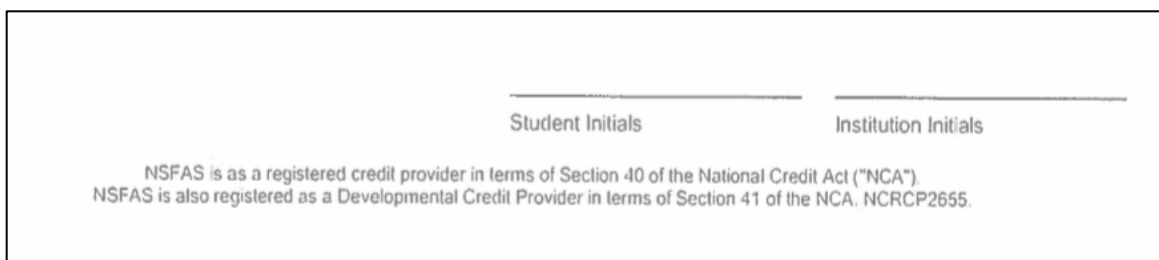


Figure 5: Footer of each page of the Agreement Form (NSFAS, 2018)

There is a demonstration of power relations between the specific parties needed to initial the Agreement form. I present an example of power relations through Fairclough’s topics of (a) situational context and (b) topic and point.

Situational context speaks to the activity of ‘how interpreters arrive at interpretations of the situational context’ (Fairclough, 1989:146). In other words, situational context speaks to the reception of text based on both the situation and the interpretational context of the interpreter. Fairclough presents four questions to explore the main features of situational context, as displayed in Table 5.

Table 5: Situational context: four questions of engagement (Fairclough, 1989:146)

Situational context: four questions of engagement	
What’s going on?	(a) Contents
Who’s involved?	(b) Subjects
In what relations?	(c) Relations
What’s the role of language in what’s going on?	(d) Connections

These four questions allow for mapping out the situational context of the Agreement Form.

The *contents* of the document hold its purpose. There is a particular social order and assumed positionality of the stakeholders. The activity of signing the contract document answers the question as the legal binding between the stakeholders is happening: the contents of this engagement relies on this activity taking place.

The *subjects* involved in this activity are the DBE, the university and the bursary applicant. Different elements determine how these subjects are positioned, not in relation to each other, but how they are expected to function in terms of social identities and speaking and listening positions (Fairclough, 1989:148).

The social identities of the stakeholders rest on the assumptions of how these identities are determined Agreement Form. The subject positions depend on a particular stance: the university is assumed to be responsible for the competent completion of the document and to function as the provider of the necessary teacher education. The social identity of the bursary provider is positioned as the administrative and financial provider and little else. The applicant functions as the completer of the form, only positioned for this single function within this activity.

Speaking and listening positions allow for exploring the scope of influence from each stakeholder. In the context of the Agreement Form, speaking and listening positions are not typically verbal communication. Rather, it occurs through the exchange of recognisable utterances in marks on paper and how it informs the situational context of the policy document. The university is assumed to hold the position of both speaker and listener: firstly, to direct and manage the applicant in the signing process (speaker), and, secondly, to receive the application (listener) and

to provide education and allocate funds. The Department of Basic Education (DBE) is assumed to hold the position of speaker and listener: firstly, to direct and manage the university (speaker) in allocating funds and ensuring the application processes are correct; secondly, to direct the allocation of funds and legal compliance (listener); and, thirdly, to direct and manage the applicant during the placement process (speaker). The applicant is assumed to hold the position of the listener: to receive the information from the document and complete its obligations.

Fairclough's third question, 'In what relations?', explores the relations between subject positions more analytically, looking at the nature of relationships and relationships of power (Fairclough, 1989:148). The nature of relationships between stakeholders is informed by the subject positionality and relies on how the subjects engage with each other. While I spend more time exploring embedded notions of power later in this chapter, it is important to note here that the nature of these relationships embody relationships of power as they relate to the Funza Lushaka Bursary.

Fairclough's fourth and final question, 'What's the role of language?', examines how connections in the language used in the document operate within and in relation to the situational context. Firstly, the role of language presents a connection between applicants' assumed competent understanding of English (the only language in which this document is available) and the assumed abilities of university representatives to explain the language used in the document. Secondly, the role of language presents a connection between the assumed delivery of control from the DBE, university and then the applicant. The role of language here presents the connections between how the applicant receives the explicit and implicit directions controlled by the DBE and delivered by the university. The genre of language used is contractual. The use of this genre is understandable, but recipients require a particular cognitive ability to engage with which cannot

be assumed available in each bursary applicant . In so doing, the role of language here presents itself as more exclusive than inclusive for its recipient. The applicant has very limited scope to engage with the text meaningfully.

The final instrument of analysis in the interpretation (processing analysis) box is topic and point, where 'the 'point' of the text is a summary interpretation of the text as a whole, which interpreters arrive at' (Fairclough, 1989:144). The point of a text is important 'for it is the point that is generally retained in memory, recalled and intertextually alluded to or reported in other texts' (Fairclough, 1989:160).

The long-term effects are the reason for this level of analysis: 'If it is the point of a text that it has longer-term effects on the interpreter, then it is important to be conscious of the social origins of the cognitive apparatus that the interpreter relies upon to interpret the point' (Fairclough, 1989:160).

The longer-term effects of this document raise the important question: which resources do applicants have to engage with the contents of the document? The first possible resource is the university representative, who may act as a mediator of the contents of the document for the applicant. This resource depends on the capacity of university representatives during a busy academic time of the year, so it cannot be assumed to be readily available across all universities. The second possible resource is the applicant themselves in their abilities to engage with the text and their connections with the details of its long-term effects. However, not all applicants can be assumed to have this resource.

The interpretation box's focus on topic and point highlights the need to investigate the socio-historical backgrounds of applicants, the university and the Department of Basic Education's intentions, as discussed in the next section.

4.1.3 Box three: Explanation (social analysis)

The final box of Fairclough's model looks at the socio-historical conditions which govern the process of interpretation in the second box (Janks, 1997). The box of explanation (Fairclough, 1989:162) allows analysis to shine light on 'relations of power and domination and [...] ideologies'. Shining light on these relations provides the analytical basis to explore social value(s) of texts and examine what Fairclough (1989) terms social struggles. In this section, I present a deeper analysis of positioning members' resources and social structures. I closely examine social determinants and situational effects to explain the social context of the Agreement Form.

The explanation box highlights how discourse is 'part of a social process' (Fairclough, 1989:163). In this social process, discourse contributes to 'the usually unintended and unconscious side-effect' (Fairclough, 1989:162). It demonstrates how social structures are shaped by members'

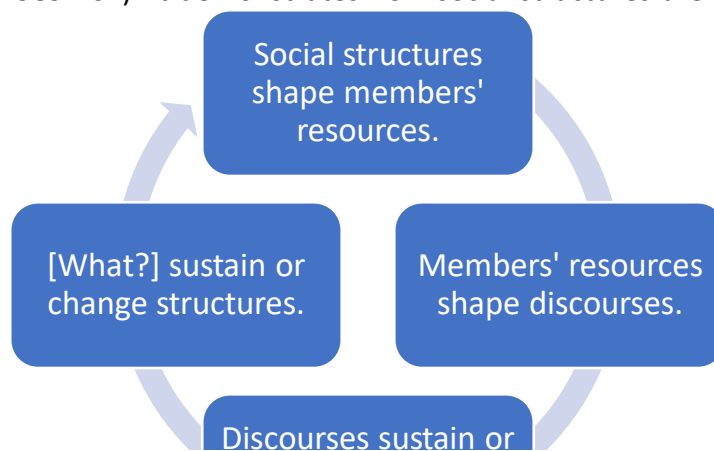


Figure 6: Social determinations and effects mediated by members' resources (author's own figure derived from Fairclough (1989:163))

resources, which then carry social potential where the changes are either maintained or altered, as displayed in the figure below.

This figure portrays how social structures have the potential to change or stay the same as a consequence of the ‘social determination of discourse’ (Fairclough, 1989:163). Fairclough (1989:164) posits that ‘there are different ways of seeing the same discourse according to whether we are focusing upon it as situational, institutional or societal practice’. These ways of seeing rests on a larger, complex concept of ideology. These ideologies are different when explored from either societal, institutional or situational perspectives.

The third box points to the fact that the Agreement Form does not stand in isolation from its social relationships.

4.4 Funza Lushaka Bursary Journey

I examine these social relationships through the personal and experiential aspect of what I call the bursary holder’s Funza Lushaka Bursary Journey, portrayed in the figure below.

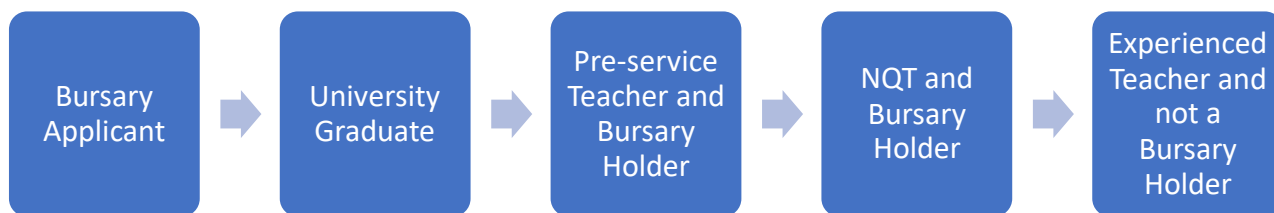


Figure 7: The Funza Lushaka Bursary Journey

The journey starts with the application process. This process moved online from 2008 due to the large volume of applications received in hard copy, whereas online applications were considered on a rolling basis (JET Education Services, 2016a:137). JET (Jet Education Services, 2016b:141) found that 92.3 per cent of applicants reported that 'it is easy to access the Funza Lushaka Application Forms'. The high figure suggests that the online medium is satisfactory in managing the initial point of administration in applying for the bursary. What this figure unintentionally speaks to is the direction of communication: it suggests the application process was one-directional, where the applicant provides information to a required source but remains silent in natural questioning.

Part of the application process involves the selection criteria for applicants. This information is presented on the Funza Lushaka website (www.funzalushaka.doe.gov.za), outlining fifteen points in its criteria for successful applications, as the extract in the figure below shows:

1. The bursary is only awarded to South African citizens with a valid South African ID number.
 2. Allocation of Funza Lushaka bursaries to Higher Education Institution employees, their spouse and their dependents/children is not permissible.
 3. Bursary applicants must already have been accepted into a either BEd or PGCE qualification at an accredited public University. The applicant must also meet the national selection criteria for the Funza Lushaka bursary.
 4. The bursary will only be awarded if **two** of the priority area subjects are included as a specialisation in the teaching qualification.
 5. Please note that you are responsible for paying your registration fee, awaiting the outcome of the bursary application. **Paying for the registration fee, does not mean you will receive the bursary.**
 6. The Bursary Selection Committee meets and processes all bursary applications during February and March of the academic year.
 7. The Funza Lushaka Bursary Coordinator at the University will notify you, not later than 30 April, as to whether you have been awarded the bursary or not.
 8. The bursary holder is not allowed to change the area of specialisation on which basis the bursary was awarded.
 9. On qualifying, the bursar will be required to take up a provincial teaching post. The bursar will not be granted permission to defer this contractual obligation, for example, to continue with full-time Honours studies. Nor, will the bursar be granted permission to take a “gap year”.
 10. Bursars will be expected to have and retain an e-mail address and a cell phone contact number for the duration of the study for communication purposes.
 11. The bursary must be repaid if the recipient fails to meet the requirements of the bursary agreement.
 12. The amount that is repayable is the full amount of the bursary received under the programme, less one year’s funding for every year spent teaching at a public school. Interest will be charged at the rate determined by the National Student Financial Aid Scheme (NSFAS) who administer financial aspects of the bursary on behalf of the Department of Basic Education.
 13. The bursary is awarded for one academic year at a time. On proof of academic success, the bursary may be renewed each year for the official duration of the qualification. The bursary holder will be required to re-apply from the 1st of October annually.
 14. The applicant should demonstrate good academic ability;
 15. **The applicant must show commitment to a teaching career, which includes: interest in working with young people; enthusiasm for a professional career in teaching; readiness to face and surmount difficult challenges and personal integrity;**
- (<http://www.funzalushaka.doe.gov.za/application/application.jsp>, 17 February 2017)

Figure 8: Criteria for bursary applicants (reference, bold and highlight my own)

The criteria for a successful application offer a range of possibilities: from how the bursary is only available to South African citizens (point 1) to the priority subject areas the bursary recognises

and that the applicant commits to teaching (point 15). While points 1 – 14 cover administrative, contractual procedures and limitations between the applicant, university and the DBE, point 15 contains the only mention of the person applying for the bursary – asking the applicant for ‘commitment’ and ‘readiness to face challenges’. Point 15 contains certain assumptions of bursary applicants: that (1) they are expected to teach for the same number of years they had taken the bursary, and (2) they should be ready to shoulder difficult challenges, personally, pedagogically and professionally.

The behaviour of the bursary applicant can be considered through the lens of the theory of planned behaviour or theory of reasoned action. The theory of reasoned action is a theoretical concept which ‘is based on the premise that individuals are rational and make systematic use of information available to them’ (Belleau et al., 2007:246). In its view, bursary applicants rationally use the information made available online (e.g. the bursary website, possible Facebook access, possible information from peers and teachers) to decide to apply for the bursary and commit to it, which predicts their behaviour for a period of time.

However, the question can be asked as to *why* applicants would make this commitment. Several reasons might support applicants’ decisions, including aspiration (e.g. entering into a skilled profession), economic choices (e.g. promised job placement which equates above average employment status), passion (e.g. always wanted to be a teacher, and this avenue is the most logical) and figuring out what to do (e.g. this commitment solves the problem of having to decide what to do for the next eight years).

Principal-agent theory helps to answer these questions and sheds another light on the relationship between the parties to this agreement. Bursary applicants have rich resources on offer for exchange (e.g. desire to teach, passion for teaching, willingness to teach for set number

of years). The DBE also has rich resources on offer for exchange (e.g. full financial support, job security, social status, entry into a professional, skilled job). The DBE (principal) requires a cohort of applicants (agent) who will in time qualify as teachers, a task it could not do by itself.

After finishing their studies, bursary holders are placed as teachers. The placement process for applicants has been documented as ineffective and compromised by organisational issues between the PED and DBE (JET Education Services, 2016b:217). There is no system to track when applicants change the course of their degrees, potentially altering their priority subjects (teaching methods), placing pressure on the placement process (JET Education Services, 2016a:218). Eighty-eight per cent of graduates reported not receiving any communication around placement or having to pay back to NSFAS (JET Education Services, 2016b:218). NSFAS as the body which allocates the monies to the successful bursary applicants.

‘NSFAS could not confirm whether any money had been paid back to the fund, except in a small number of cases where students had voluntarily contacted NSFAS and agreed to convert their bursaries to loans’ (JET Education Services, 2016b:167). The challenge to effectively track graduates detracts from the mandate of the bursary.

Finally, the fifth stage, ‘Experienced Teacher and not a Bursary Holder’, defines when the document no longer has direct influence over the bursary holder’s time and space: it is where the obligatory service is complete. This stage is important to consider because it continues to impact the rehabilitation of education post-1994. This stage is filled with silence and unasked questions: what happens after the bursary is satisfied with the service of their graduates? What is the future of the education of teachers in South Africa? What specific future impact has the bursary made? I would argue it would be helpful for the bursary to track the movements of its

graduates, not only from a placement perspective but also from the potential long-term investment the DBE had made into teachers and education.

4.5 Embedded power

Foucault (1975:172) describes ‘embedding’ as involving ‘an architecture that is no longer built simply to be seen [...] that would operate to transform individuals: to act on those it shelters, to provide a hold on their conduct, to carry the effects of power right to them, to make it possible to know them, to alter them’. Below, I present an analysis of each of these actions with reference to the social relations between the DBE and the bursary applicant, the two parties in this power dynamic.

Point to the words ‘to act on those it shelters’, Ball asserts ‘risk constantly reinforces responsibility and the values of the developmental self’ (2003:149). The flip side of this lack of risk, according to Ball, is that there is little reinforcement of values of the developmental self and less enforced responsibility. The DBE guarantees the seamless process that all university tuition will be credited to the student’s account, protecting the applicant of any responsibility of paying their fees and from engaging with any defaulting status with the university:

1.1 The Bursary Amount will be paid as credit to the Student’s account with that Higher Education Institution, for the academic and residence fees, student levies and other similar costs of pursuing that Course of Study. Payment will be made to the Higher Education Institution as and when NSFAS decides. (NSFAS, 2018:5)

Simultaneously, the applicant is sheltered from being responsible for the conversion of the financial support into a loan, nor are they responsible for the terms of repayment as this is predetermined.

6.2 That interest will be charged at the Initial Annual Rate of Interest recorded in paragraph 5 of the Schedule of Particulars. This Rate may be varied (i.e.: increased or reduced) from time to time at the entire discretion of NSFAS. (NSFAS, 2018:6)

8.1.8 To declare that the Bursary has been converted into a Loan and to demand, by written notice to the Student that the Student must repay the whole unpaid balance of the Loan Amount and accrued interest immediately, in one lump sum. (NSFAS, 2018:7)

10.1 For so long as the Student is in receipt of a Bursary NSFAS will post a Statement to the Student every Three (3) months which will, among other things, show the amount the Bursary payments made to the Student over the previous Three (3) months; (NSFAS, 2018:7)

The nature of how this may take place is demonstrated in Foucault's next point. 'To provide a hold on their conduct' suggests the power lies in the degree of expectation that the 'architecture' may demand. The department is explicit in what it expects from the applicant in return for its financial support. However, what is implicit is the power it exerts over how the applicant conducts themselves and how the applicant behaves. In terms of the journey of the applicant, this behaviour begins from the first year of signing the Agreement Form and extends through to in-service teaching. The hold over the applicant's conduct is implicitly suggested through the role of the Schedule of Particulars at the very start of the Agreement Form. In it, there is a single declaration of residence, details which are vital in all legal communication between the bursary and the bursary applicant.

The importance of this Schedule of Particulars extends further than the receipt of statements or receipt of written communication. Should the student attempt to terminate their agreement with NSFAS (as the body which allocates the monies), for any reason, NSFAS will only accept delivery from addresses declared in the Schedule of Particulars:

18.4 NSFAS chooses the physical address recorded in paragraph 4 of the Schedule of Particulars as the address at which it will accept delivery of all pleadings or other legal process in connection with this Agreement. (NSFAS, 2018:9)

It means that should a bursary applicant, for whatever reason, not change the record of their residential address with NSFAS and wish to terminate their agreement, their legal process will not be received.

Foucault's reference to 'carry[ing] the effects of power right to them' suggests that power may not be carried directly but rather indirectly. This distinction suggests, again, that power is not necessarily exerted overtly while still being felt by its receiver. The Agreement Form contains instances where it 'carr(ies) the effects of power right to them', that is, the bursary holders, quieter than the overt obligatory nature of the bursary:

11.11 Where the Student is allocated an email address and the use of email facilities by the Higher Education Institution at which he/she is registered, the Student will access the Funza Lushaka website (URL <http://funzalushaka.doe.gov.za>) on a regular basis (at least once a month) to check for communication from the Department of Education. The Department of Basic Education will communicate with the Student using emails and SMSs. The Student will ensure that any change to his/her email address or cell phone number is entered into his/her personal information on the Funza Lushaka website. (NSFAS, 2018:8)

This quote demonstrates how the bursary's effects of power can be carried right to the bursary applicant in the legally binding document, which includes the expectation of a minimum frequency of being online and accessing an email inbox. The communication from the Department of Education is crucial to remain in touch with applicants, yet 11.11 of the Agreement Form demonstrates the department's behaviour of taking ownership over smaller tasks of the bursary applicant.

Foucault's last assertion, 'to make it possible to know them, to alter them', point towards the longer-lasting impact of embedded notions of power. The assertion speaks of 'know[ing] them' followed with 'to alter them'. The DBE and NSFAS do not spend much time 'knowing' bursary applicants; instead, it spends a considerable amount of time processing the applicant to ensure their details are correct and fit the selection criteria, particularly their priority teaching subjects and their academic performance at university. In this way, the DBE and NSFAS makes it possible to 'know them' to 'alter them'. It speaks to how the bursary carries enough power to change bursary applicants, suggesting that the DBE and NSFAS do not only provide financial support in exchange for repayment through in-service teaching, but it also carries the power to change its applicants through embedded power structures.

How this embedded power alters bursary holders can also be seen in where financial responsibility falls should the bursary convert into a loan:

13.1.9 The Student will be responsible for all legal costs incurred by NSFAS, namely;

13.1.9.1 The fees charged by NSFAS's attorneys, on an attorney and own client basis as agreed between the Student and NSFAS, or as taxed and allowed by the taxing master of the court in which the legal proceedings are brought. (NSFAS, 2018:8)

Should a bursary holder sue NSFAS for whatever reason and NSFAS responds with a continuation to court, the Agreement Form legally binds the bursary holder as responsible for 'all legal costs incurred by NSFAS'. While the relations between the department and the bursary holder may not ordinarily reach this stage, this clause makes this possibility explicit and suggests how the DBE and NSFAS is positioned to carry the power to change the bursary holder's social reputation and much longer financial status and health.

My use of Foucault's elaboration of embedding demonstrates an implicit but powerful social relation between the bursary holder and the DBE and NSFAS, from the bursary holder's receipt of fees to the nature of what their life may look like a few years from signing the Agreement Form.

My analysis of the social relations between the DBE and NSFAS and the bursary applicant relies on the framework of the *principal-agent* theory, which reveals the role of an 'exchange' between the DBE and NSFAS provisions (principal) and the future behaviour of the bursary applicant (agent). Braun and Guston's (2003) analysis extends this relationship to reveal the department as principal can experience both moral hazards and adverse selection. The DBE and NSFAS have uncertainty whether the bursary applicant's quality of performance will satisfy the contract. The DBE and NSFAS seeks to address this uncertainty by attempting to exert power over the bursary applicant in the Agreement Form. Foucault's assertions on embeddedness allow analysis of how the document reveals the DBE and NSFAS exerts its dominant power position. The social relation between the DBE and NSFAS and the applicant in the Agreement Form is clear: the bursary applicant accepts directive from the DBE and NSFAS.

4.6 Use of time

In the chapter "Docile Bodies" in *Discipline and Punish*, Foucault (1975) discusses a formative concept of organised labour through to an exploration of the school classroom to demonstrate the movement of time, space and individuals. He explores the aspect of control with reference to a timetable as 'the general framework for an activity; it is rather a collective and obligatory rhythm, imposed from the outside' (Foucault, 1975:152). Foucault (1975:152) suggests that the time used by an individual demonstrates a control of power, as 'time penetrates the body and with it all the meticulous controls of power'. While presented in the use of an individual's physical

body, the link between time and power presents grounds to examine how time may be used by bodies (people) and controls of institutional power.

In the context of this study, bursary holders' relationship with the bursary has a specific timespan. The Agreement Form clearly stipulates four years of financial support must be exchanged for four years of teaching as service repayment. On the first page, it is made clear: '(P)lacement cannot be deferred for any reason. For example, bursars who complete their initial qualification cannot defer placement in order to continue study in an honours programme' (National Student Financial Aid Scheme, 2018:1). Should a bursary holder discover or demonstrate excellence in their university studies, their unplanned activity to study further is legally prohibited during the expected period of service repayment.

The general framework for activity is seen through how the government allocates Bursary NQTs' time spent in schools through considerations of economic, distribution and social value. From an economic consideration, the government is able to commit resources to predict and regulate the number of teachers entering schools and budget for their monetary requirements (e.g. salaries, state-subsidised pension, state-subsidised housing allowance and state-subsidised medical aid). The time spent in schools can then be estimated and checked over the number of years, bringing stability to the economic forecasts of the public service sector.

From a distribution consideration, the government can commit resources to the design of the bursary in terms of its priority subjects based on needed time spent in schools. Since its implementation, the government's priority subjects have changed to reflect national demand.

From a social value consideration, the government has committed both its authority and resources to teacher education, backing all South African universities through this teacher

recruitment campaign and signalling the teaching profession as a viable and powerful industry to school leavers. The social value of teaching then moves towards additional value on not only teaching but the commitment to the length of time spent in schools as a qualified teacher teaching a priority subject.

In terms of the considerations of economic, distribution and social value(s), on closer analysis, there is a much more specific framework for activity through a collective and obligatory rhythm. This specificity creates room to explore Foucault’s theories on relations of control and power.

Table 6 compares the bursary’s general framework with the programmatic facts of the bursary’s specific framework, or what Foucault calls its ‘collective and obligatory rhythm’ as well as who controls this aspect to show how power is ‘imposed from the outside’, as Foucault phrases it.

Table 6: Comparison between the general and specific framework for the bursary

General framework for activity: <i>what are the expectations of the bursary?</i>	Specific framework: <i>what are the practices of the bursary?</i>	Power: <i>what controls this aspect?</i>
1. Bursary applicants are free to study either a B.Ed. (4 years) or PGCE (1 year).	1a. Any study funded by the bursary must be on the Subject Priority list of the year, e.g. FET mathematics.	The bursary
2. All bursary applicants will be placed by the PED.	2a. The placement process is determined by provincial needs, e.g. if the Kwa-Zulu Natal province needs a certain number of FET mathematics teachers, bursary NQTs will be placed in this region.	The bursary’s placement process

3. Repayment of the bursary in the form of a loan is possible.	3a. Repayment of the bursary in the form of a loan is possible but at an undetermined interest rate, as determined by NSFAS.	DBE and NSFAS
4. As stated by the provincial circular of April 2011, bursary applicants receive hiring preferences for posts.	4a. Hiring preferences are determined by school needs, and it is presented as independent from the placement process.	The bursary's placement process
5. In improving the quality and access of education to South Africans, the bursary offers full financial support to tertiary studies at any South African university to qualify as a teacher.	5a. Despite possible exemplary academic performance during studies, further university studies is prohibited.	The bursary and NSFAS
6. On qualifying, bursary NQTs must teach at a public school.	6a. Bursary applicants must teach at a public school and be employed by the DBE, i.e. they may not be employed by the school governing body.	The bursary

Error! Reference source not found. demonstrates three aspects of this analysis and its alignment to the work of Foucault. Firstly, the general framework of the bursary proves to be much more specific when in implementation and presents a predetermined rhythm of time of people and institutions. Secondly, this collective and obligatory rhythm presents the bursary as an attractive and needed opportunity to improve the (a) employment and (b) quality of teachers in South African schools, but the policy negates individuals' choice or unplanned behaviour through obligatory service as a teacher. Thirdly, all control and any unplanned activity rest solely with the DBE, through the bursary and NSFAS.

4.3.3 The imagined experience of Mpho: scenarios of the bursary

Foucault's theoretical claims of control and power can be humanised through empathy mapping, a principle from the field of design thinking. Empathy mapping is the process of repositioning one's understanding into the experience of the product/service. It is similar to Robinson's (1999) extract on Miriam referenced earlier. However, Robinson's extract does not extend into scenarios of experiences.

For this exercise, the bursary applicant will be called Mpho, and the pronouns "they/them/theirs" will be used to refer to them. Mpho has just finished matric and is incredibly passionate about becoming a teacher. Mpho heard about the Funza Lushaka Bursary Program from a teacher at their school and is excited to apply. Their application is successful, and they begin their Bachelor of Education degree in Mathematics and History. After the second teaching practice, Mpho is thinking of not becoming a teacher, describing problems with the job and, while they are enjoying studying at university, they have decreasing interest in becoming a teacher and teaching at a public school.

1. Mpho exits the bursary program earlier and has their funding converted to a loan. Mpho is now in debt with the DBE, at an undetermined interest rate, and needs to factor this into their future earnings.
2. Mpho completes their degree with excellent academic performance and wishes to further their postgraduate students but is prohibited legally until the service period is completed. They then apply to state posts in their teaching subjects.
3. Mpho completes their degree but has no intention of being a teacher at a public school. They wait out the 90-day window period and move into a non-education or non-teaching industry.
4. Mpho enters a school, not as passionately as before, but intentional about

Figure 9: Four possible scenarios of Mpho on their Funza Lushaka Bursary Journey

Based on this background, I consider four possible scenarios for Mpho's bursary journey in the figure above. These four scenarios cannot encompass the countless complex scenarios that are possible, but they do present a range of possibilities to consider. Each scenario speaks to a moment where an intended action produced an unintended consequence, shining light on where the bursary policy fractures under contextual and societal changes.

Richardson's (2008) work on emotional exhaustion speaks to fatigue, frustration or being unable to face another day on the job as a teacher. While Richardson's work is within the American context, the deliverables of teachers is assumed to be consistent to the role of a teacher. It would be helpful to reposition Richardson's concept of emotional exhaustion with how the use of time demonstrates control and power. Bursary applicants are unable to (1) extend their degree, (2) defer their placement for further study, (3) release themselves of their obligation without entering into contractual debt. These three aspects speak to the level of control the bursary holds over the bursary applicant, disallowing outlets for their fatigue (degree extension), frustration (deferring placement for further academic growth) and their being unable to face another day on the job (either university studies or in-service teaching).

Applying Foucault's framework on the bursary journey of applicants shines light on the restrictive influence the bursary carries on its holders, providing a foundation for deeper interrogation of the bursary and how it is experienced. The focus of this study was on the bursary limits and restrictions on bursary holders. However aspects of the restrictions continue when graduates qualify as school teachers. This completion of this study is to act as a contributing voice on how to improve how the bursary is experienced.

CHAPTER 5: CONCLUSION

This analysis has focused on the discourse that emerges from a single document, namely the 10-page Agreement Form that regulates the functioning of the Funza Lushaka Bursary, and how this document exerts power over its applicants. My approach was qualitative and reflective, fully acknowledging my positionality as a bursary recipient. I analysed the contract document primarily using Norman Fairclough's theory of CDA and Michel Foucault's social theories on embedded power and use of time to demonstrate control.

5.1 Findings

Fairclough's CDA theory describes 'language as a form of social practice' (Fairclough, 1989:22). The use of Fairclough's first box of textual analysis revealed that the language used in the document is formal, contractual and grammatically negative. The experiential value created is what I termed an assumed deficit model in how the bursary shaped a particular ideology of the applicant. The document made consistent use of ideologically contested words built on certain assumptions: (1) there is a need in the teaching profession; (2) the bursary is the overall distributor of funds; (3) the bursary is the validating authority in terms of what it assumes the bursary applicant requires to become a teacher; (4) the government knows which priority subjects are needed; and (5) the government can satisfy this need. However, the findings of JET's study on the fractured placement process contradicts the last two assumptions regarding priority subjects (JET Education Services, 2016a,b).

Fairclough's second box, processing analysis, showed that the social identities and social order of the stakeholders in this Agreement Form are underpinned by the assumptions of their roles in terms of listening and speaking positions. The analysis found that the listening and speaking

positions were deeply unequal. Even though bursary applicants and bursary holders are assumed to be completely agentic and able to fulfil expected positions, JET's report and institutional power relations make clear that it is not the case.

Both the university and the bursary applicant were unable to complete the expectations assumed in the Agreement Form due to the nature of their realities and relationships of power. For example, (1) the capacity of university representatives to carry through its assumed function as outlined in the policy is compromised because they do not have sufficient time to explain the nuances of the Agreement Form to all interested applicants, and (2) the bursary applicants do not have enough knowledge and resources available to them to understand the Agreement Form and its implications fully, and there is no opportunity for them to engage with any contested points. Fairclough's theory of topic and point emphasises that '[i]f it is the point of a text, it has longer-term effects on the interpreter, then it is important to be conscious of the social origins of the cognitive apparatus that the interpreter relies upon to interpret the point' (Fairclough, 1989:160).

This finding ties in with Fairclough's third box, social analysis, which holds that discourse is 'part of a social process' (Fairclough, 1989:163). In terms of stakeholders' resources (e.g. time, capacity, knowledge), social structures are transmitted through what people have and don't have.

I supplemented the discourse analysis with the use of Foucault's concepts of embedded power and use of time. The analysis revealed the depth of impact of the bursary's power relations, in that the bursary steers people, behaviour, institutions and applicants' sense of being. The concept of use of time was used to explore the economic, distribution and social value consideration of how the government allocated resources to support the bursary's intention. The

analysis pointed to the length of time that the Agreement Form would influence the applicant. Foucault's theories on use of time in general and specific frameworks also showed that the bursary's impact was more specific than initially suggested, with a clear, predetermined rhythm of time for both people and institutions.

Lastly, the imagined experience of Mpho humanised scenarios in which the bursary imposes challenges on applicants. Generalising teachers' experiences at any time in their career removes nuances that are often important to consider and makes the information impersonal. Robinson's (1999) persona of Miriam was used to describe the immense influence the change of government, policy and teacher expectations had on a teacher in a particular scenario. Similarly, my persona, Mpho, is presented in this study as a particular lens to demonstrate a nuanced understanding of a particular moment: both personas stand as signals of scenarios of experience(s) to reveal new insight.

Overall, my findings point towards a need for an interrogation of the bursary to better satisfy its intended principles. The bursary is built on assumptions about the definition and context of teaching. These include ideas about time (length in years) and space (placement at public schools) and the motivations and resources of individuals. The bursary's design has limited space for the person, an individual who takes up a particular space, at a particular time, in a particular way. Unfortunately the homogenisation of individuals is a form of ignorance, contrasting the Minister of Education's that teachers are 'the frontline in our defence against ignorance' (Pandor, 2006).

By some metrics, the bursary can be considered a success. It goes some way to meeting its primary objectives of increasing affordability and access to education for new teachers. What is overlooked in assessments like that of JET is the impact on the person behind the teacher, the person who was (or was not) in teaching. The evaluation report was helpful in shining light on high-level areas: evaluating programmatic improvement, the bursary's selection process and allocation of funds to universities. JET's report also shone light on provincial placements and establishing which areas needed more support to improve the placement process. While these findings are helpful in reaching one of the objectives of the bursary in improving the quality of teachers across the country, what was absent were the experiences of the people who would go on to become teachers and 'defend against ignorance'. JET's report can be taken to reveal just how much ITE needs a critical perspective on the impact of national policy on future teachers. The bursary determines the movement of the people it supports for a maximum of eight years, but who are these people and who are these teachers? My distinction between the person and the teacher demands further study but begins the conversation on how discourse can erase these distinctions.

5.2 Recommendations

The findings from the analysis point to five insights and accompanying recommendations.

Firstly, the silencing of applicants can make their Funza Lushaka Journey particularly long and complex. The discourse of the Agreement Form distances the text producer, the government, from the bursary holder. The process is not empowering. It only provides the platform for employing people who perform a specific state function. Potential NQTs need far more than only financial aid to be successful teachers. This finding points to a need to reposition the bursary to include the person of the applicant and acknowledge and develop their agency.

Secondly, the silencing of NQTs becomes problematic from a mental health perspective. When NQTs walk into their first school, like anyone else, they are exposed to many people from all parts of society, the impact of which alone can be overwhelming. Providing only financial support to these NQTs encourages silence. It signals that the person is alone on the journey and must seek non-financial assistance elsewhere. I recommend that the supportive and listening role provided to bursary holders must be considered. One possible means to do so is through provincial systems that are in place for NQTs to be paired with mentor teachers at school level. However, the interrogation and analysis of the positive impact of this system fall outside the scope of this study.

Thirdly, the lack of support contributes to the conversation around how government engages with citizenship in the public sector. How is South Africa positioning the development of citizenship in its teachers? Where are teachers engaging with their role as national ambassadors when benefiting from public funding through bursary? The lack of positioning of bursary NQTs within their national context of contribution to the citizenship project is counterintuitive. The question of belonging is fertile ground to examine the national community of teachers against a complex South African historical and contemporary background. The bursary provides a prime opportunity to construct communities of practice with its NQTs beyond only financial support. I recommend the bursary role's in not only the ITE and NQT space but also the development of the country's development of citizenship be reconsidered.

Fourthly, the bursary does not exist in isolation in the ITE sector. Instead, the bursary is positioned within a network of critically important stakeholders and contributors. Together with the DBE, the network of stakeholders and contributors which surround the bursary includes Higher Education Institutions, ITE curriculum designers, policy makers, teacher education programmes, schools, government funders and non-government funders in South Africa and globally. A deeper analysis

of the positionality of the bursary itself within the network of major ITE stakeholders is recommended.

Finally, it is recommended that the discourse used in bursary documents such as the Agreement Form must take into account the social origins of the bursary applicant. As it stands, it overlooks the unequal cognitive and linguistic abilities available to young South Africans. The genre of contractual language is an exclusive space requiring a particular set of cognitive abilities and knowledge to interpret and engage with it. I recommend that documents like the Agreement Form should accommodate the social realities of the range of potential applicants to position the DBE and NSFAS as conscious of the unequal backgrounds and implicit subjectivities of applicants.

5.3 Conclusion

CDA is explicitly focused on moral responsibility and social justice (Widdowson, 1998:136). Similarly, the Funza Lushaka Bursary Programme aims to transform South Africa's historical inequalities. This minor dissertation has argued that the bursary's commitment to redress inequality must go deeper than surface-level financial support. Simply by being more aware of the discourse used in documents such as the Agreement Form, it can do more to empower young people who continue as teachers and national ambassadors in classrooms. I argue that addressing the challenges presented in this dissertation should be viewed as an opportunity to liberate bursary-holding NQTs and thereby effect a transformation of teachers and the teaching profession. Borrowing and paraphrasing Jansen (2001), rather than spawn innovation, the bursary risks undermining the already fragile learning environment in schools and classrooms of the new South Africa by overlooking the individual needs of its beneficiaries.

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ADDENDUM A: 2018 Funza Lushaka Bursary Policy

Your ID Number																			
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BURSARY AGREEMENT FORM FUNZA LUSHAKA

	2018	For use by NSFAS Head Office			
		Acc No.		Bursary No.	

This Agreement is to be read together with the Implementation Protocol in terms of the Intergovernmental Relations Framework Act, 2005 (No. 13 of 2005) a copy of which may be consulted by the Student on application to a Student Financial Aid Office or NSFAS.

IMPORTANT:
 Attach a certified copy of your South African Identity Document.
 Please use black ink when completing the Loan Agreement Form.
 Use of correcting fluids, (e.g. Tippex) will invalidate this Loan Agreement Form.
 Any alterations must be countersigned by the student and the institution.
 All pages must be initialed by the student and the institution.

NATIONAL STUDENT FINANCIAL AID SCHEME
 (Referred to in this agreement as "NSFAS")
 and

(Referred to in this agreement as "the STUDENT")

About The Funza Lushaka Bursary Programme

The Department of Basic Education (DBE) has established the Funza Lushaka Bursary Programme to attract able and committed men and women into teaching by providing them with a bursary to enable them to qualify as teachers in priority areas of learning.

In return recipients will be placed by a provincial education department to teach in a public school in which a teacher is needed, thereby repaying the nation in service for the benefit of their higher education. Bursars cannot choose where they will be placed. Bursars can be placed anywhere in the province, or in the country.

Each year of service will repay one full-time year of bursary-assisted study. The bursar is obliged to take up placement immediately on completion of the initial teaching qualification.

Placement cannot be deferred for any reason. For example, bursars who complete their initial qualification cannot defer placement in order to continue study in an honours programme. If a course of study is not successfully completed or the mandatory teaching service period is not satisfactorily completed the remaining value of the bursary will be converted into a loan which defaulters will be required to repay according to the provisions of this Agreement. Funza Lushaka bursaries are available to eligible South African students who choose a course of study in any of the following programmes and are preparing to teach in a designated priority area:

NSFAS has been appointed by the Minister of Education to administer the Funza Lushaka Bursary Programme and will undertake the recovery from defaulters of the loan principal and interest in terms of this Agreement. It is of great importance that loans are repaid as soon as possible. A rate of interest is charged which is sufficient to preserve the value of the loan funds, with due regard to inflation.

Student Initials

Institution Initials

Your ID Number																			
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. PARTICULARS OF STUDENT Please fill out as reflected on your ID document*:

* ID Number																			
* Surname:											Maiden surname (if applicable)								
* First Names																			
Title											* Date of birth								
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female																		

Home Address (Residential)

Street Address																			
City/Town											Province								
Country											Postal Code								
Home Telephone											Cell phone								
Email Address																			

Address WHILE STUDYING

Street Address																			
City/Town											Province								
Postal code																			
Home telephone											Cell phone								
Email Address																			

2. PARTICULARS OF NEXT OF KIN DETAILS

Surname											Name						Title				
Relationship (parent, legal guardian, sibling, spouse, partner, other):																					
Next-of-kin address:																					
Street Address																					
City/Town											Province										

Student Initials

Institution Initials



Your ID Number																			
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Country		Postal Code	
Next-of-kin contact details			
Home telephone		Work telephone	
Cell phone			

3. PARTICULARS OF HIGHER EDUCATION INSTITUTION

Name of Institution		Student Number	
Course of Study (B Science, B Commerce, PGCE, etc)			
Priority area subjects			
Year of study (1st, 2nd, etc.)			

At the end of this year, will you have qualified and thus be qualified to accept a teaching post? Yes No

4. PARTICULARS OF NSFAS

National Student Financial Aid Scheme (NSFAS). National Credit Regulator Registration No. 2655.	NSFAS's postal address: Private Bag X4, Plumstead 7801, South Africa NSFAS's fax number: 021 762 6386 NSFAS's email address: info@nsfas.org.za
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5. PARTICULARS OF BURSARY

Bursary Amount (subject to Bursary Conditions) R.....
 Initial amount of interest (if Bursary is converted to Loan) R.....
 Year to which bursary applies 20.....

6. PAYMENT OF BURSARY IN THE EVENT OF THE STUDENT DEFAULTING FROM THE BURSARY CONDITIONS

6.1 The terms on which the Bursary (if converted to a Loan) and interest must be repaid are set out in the Bursary Conditions, on the reverse of this Agreement, which form part of this Agreement and must be read as such.
 6.2 If a pre-agreement statement and quotation was provided to the Student, a copy of that document will be attached to this Agreement, and will also be read as part of it.

7. CONFIRMATION OF EMPLOYMENT DETAILS (if applicable)

Employer	
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Student Initials

Institution Initials



Your ID Number																			
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Employer's Address	
Department	
Contact telephone number	
Employee salary number	
PERSAL Pay point (if applicable)	

8. PREFERRED PROVINCE FOR PLACEMENT

Name of province:	
Name of District	
Envisaged completion year	

I HAVE READ THE BURSARY CONDITIONS AND HEREBY AGREE TO ABIDE BY THEM.

Signed by the STUDENT at on this..... day of.....20.....

AS WITNESSES'

1

2

STUDENT SIGNATURE

[*Any Student under the age of majority (18) must obtain the assistance and signature of his/her parent or legal guardian.]

FOR USE BY NSFAS Head Office

ACCEPTED on behalf of NSFAS at CAPE TOWN on this..... day of.....20.....

AS WITNESSES

1

2

National Student Financial Aid Scheme
Duly authorised thereto

Student Initials

Institution Initials



National Student Financial Aid Scheme

Your ID Number																				
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- 4.1.7. Resigns from, is dismissed by or otherwise leaves the service of a provincial education department by whom the Student is employed before completing the Student's service obligation in terms of this Agreement;
 - 4.1.8. Otherwise defaults from an obligation incurred in terms of this Agreement.
 - 4.2. Despite sub-clause 4.1.2 at NSFAS's entire discretion a Student's Bursary Amount may cover one additional year in a degree programme or the time required for completion of one additional course in the PGCE programme, except that only one such extension will be granted and an additional year will be considered only if the Student is able to complete the degree in the minimum period plus one year. Any additional time required will be at the recipient's own cost.
 - 4.3. If the Bursary is converted to a Loan in terms of sub-clause the Student will be responsible for the repayment of the Loan Amount plus accrued interest in accordance with the terms of this Agreement.
- 5. CANCELLATION OF SERVICE OBLIGATION**
- 5.1. On receipt of a notice from the Student as contemplated in sub-clause 11.8 of the Bursary Conditions NSFAS must immediately verify that no such offer of appointment was made within the specified period to the Student by a provincial education department.
 - 5.2. If the provincial education departments confirm that no such offer was made the Student's service obligation is cancelled and the Student has no further obligation under this Agreement
- 6. INTEREST**
- 6.1. Interest will be charged on the outstanding balance of the Loan Amount from time to time from 1 April of the year for which the loan was granted, namely the year referred to in paragraph 5 of the Schedule of Particulars.
 - 6.2. That interest will be charged at the Initial Annual Rate of Interest recorded in paragraph 5 of the Schedule of Particulars. This Rate may be varied (i.e.: increased or reduced) from time to time at the entire discretion of NSFAS. NSFAS must give the Student written notice of any new Rate no later than Thirty (30) working days after the day on which that new Rate takes effect.
 - 6.3. The interest on the Loan Amount will be compounded monthly in arrears.
 - 6.4. If the Student ought to be making repayments in terms of this Agreement, but is not, interest will be charged on arrear or unpaid amounts at the Rate contemplated in clause 6.2 above. No increased or penalty interest will be charged.

Student Initials

Institution Initials



National Student Financial Aid Scheme

Your ID Number																				
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7. REPAYMENT

- 7.1. The Student must begin repaying the Loan Amount and accrued interest in monthly instalments as soon as the Student finds employment.
- 7.2. The amount of each instalment will be set down:
 - 7.2.7. In the scales prescribed by the Minister of Education in terms of section 27 of Act 56 of 1999 ("the NSFAS Act"), or, if there are no such scales,
 - 7.2.8. In scales drawn up by NSFAS from time to time.
- 7.3. The scales prescribed by the Minister or drawn up by NSFAS will lay down a sliding scale of instalment payments, on the basis that: -
 - 7.3.7. The higher the Student's total annual income, the higher the monthly instalments.
 - 7.3.8. While the Student's total annual income is below the minimum level set by the Minister or NSFAS:
 - 7.3.8.1. The Student will not have to pay any instalments.
 - 7.3.8.2. Interest will, however, continue to be charged.
- 7.4. A schedule setting out the applicable scales is obtainable from NSFAS.
 - 7.5. While the Student's annual income is at or above the minimum level referred to in 7.3.2 above, the Student must pay the applicable monthly instalments to NSFAS, until the Loan Amount and all interest has been paid.
- 7.6. Each monthly instalment will be a separate debt, and will become due (as contemplated in section 12(1) of the Prescription Act, 1969 (No. 68 of 1969)) only on the last day of the month in which NSFAS is entitled to demand payment of that instalment.
- 7.7. Extinctive prescription will not run in respect of the outstanding balance of the Loan Amount or any accrued interest:
 - 7.7.7. During any period when the Student is not paying instalments because the Student's annual income is below the minimum level.
 - 7.7.8. For as long as the Student fails to notify NSFAS in writing that the Student's annual income has increased to or beyond that minimum level. Any such failure will be deemed to be a wilful act or omission preventing NSFAS from coming to know of the existence of a debt, as contemplated in section 12(2) of the Prescription Act, 1969.
- 7.7.9. Unless NSFAS enforces any right it may acquire to demand early repayment in terms of clause 8.
- 7.8. All instalments received will be applied by NSFAS firstly to any legal costs incurred in recovering those instalments, then to accrued interest, and finally to the outstanding balance of the Loan Amount.

8. NSFAS CAN DEMAND EARLY REPAYMENT

- 8.1. If any of the things mentioned in clause 8.2 should happen, NSFAS will be entitled:
 - 8.1.7. To withhold payment of any or all amounts to the Higher Education Institution, and/or
 - 8.1.8. To declare that the Bursary has been converted into a Loan and to demand, by written notice to the Student that the Student must repay the whole unpaid balance of the Loan Amount and accrued interest immediately, in one lump sum.
- 8.2. NSFAS will become entitled to act in the manner described in clause 8.1 if:
 - 8.2.7. The Student makes any dishonest or materially inaccurate statement in his/her application for a NSFAS loan.
 - 8.2.8. The Higher Education Institution, for whatever reason, refuses to register or admit the Student, or suspends or expels the Student.
 - 8.2.9. The Student receives any other financial assistance in connection with the Course of Study, unless such assistance has been duly notified in terms of sub-clause 11.9.2 and approved by NSFAS.
 - 8.2.10. The Student commits any breach of any term of this Agreement.
 - 8.2.11. The Student fails to progress in his/her studies to the satisfaction of NSFAS

9. EARLY SETTLEMENT AND PREPAYMENT BY THE STUDENT

- 9.1. The Student is allowed to settle his/her debt to NSFAS at any time, without giving advance notice to NSFAS.
- 9.2. The amount required to settle with NSFAS is:
 - 9.2.7. The unpaid balance of the Loan Amount at that time, plus
 - 9.2.8. The unpaid interest on the Loan Amount.
- 9.3. By paying the whole of the settlement amount to NSFAS, the Student will terminate this Agreement.
- 9.4. The Student is entitled, at any time and without notice or penalty, to prepay any amount owing to NSFAS under this Agreement, i.e.: to pay that amount even though it is not yet due or payable.

10. STATEMENTS

- 10.1. For so long as the Student is in receipt of a Bursary NSFAS will post a Statement to the Student every Three (3) months which will, among other things, show the amount of Bursary payments made to the student over the previous Three (3) months;
- 10.2. For so long as the Student is employed as a teacher by a provincial education department and until the Student's service obligation has been fulfilled in terms of the Bursary Conditions NSFAS will post an annual Statement to the Student which will, among other things, show the remainder of the service obligation that the Student must fulfil and the monetary equivalent of that remaining service obligation including accrued interest;
- 10.3. If in terms of the Bursary Conditions a Student's service obligation has been fulfilled or cancelled NSFAS will post a Statement to the Student declaring that the Student has no further obligation in terms of this Agreement and the Agreement is therefore terminated.
- 10.4. If the Bursary is converted into a Loan in terms of the Bursary Conditions NSFAS will post a Statement to the Student every Three (3) months which will, among other things, show:
 - 10.4.7. Any payments received by NSFAS from the Student in the previous Three (3) months;
 - 10.4.8. The interest which has been charged by NSFAS over the previous Three (3) months;
 - 10.4.9. The unpaid balance of the Loan and accrued interest still owed by the Student to NSFAS.
- 10.5. If the Bursary is converted into a Loan in terms of the Bursary Conditions NSFAS will also post a monthly statement to the Student, once the Student has commenced monthly instalment repayments.

11. STUDENT'S WARRANTIES

The Student warrants (i.e. guarantees) that:

- 11.1. The facts stated in paragraphs 1, 2 and 3 of the Schedule of Particulars, and in the Student's Bursary application, are true and complete.

Student Initials

Institution Initials



National Student Financial Aid Scheme

Your ID Number																				
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- 14.1. If the Student fails to make repayments to NSFAS in the manner provided for in this Agreement, one option open to NSFAS is to place the Student's name on a list of defaulting debtors maintained and published by any credit bureau.
- 14.2. If the Student fails to notify NSFAS in the manner and at the intervals referred to in clause 11.10 above, the Student will be deemed to be failing to make repayments as required by this Agreement, and NSFAS will be entitled to list the Student's name in the manner contemplated in 14.1 above.
- 14.3. Before NSFAS lists the Student's name in terms of clause 14.1, NSFAS must send the appropriate letter to the home postal address recorded in the Schedule of Particulars. That letter must:
 - 14.3.7. Notify the Student of his/her failure to make repayments, or his/her failure to comply with clause 11.10, as the case may be.
 - 14.3.8. Give the Student Fourteen (14) days from the date of the letter to commence making repayments, to resume making repayments, or to notify NSFAS in the manner contemplated in clause 11.10, as the case may be.
- 14.4. The Student agrees that the period of Fourteen (14) days referred to in clause 14.3.2 will afford the Student a reasonable opportunity (as contemplated in section 21 (4)(b) of the NSFAS Act) to begin or resume making repayments, or to notify NSFAS as required by clause 11.10.
- 14.5. The credit bureau to which NSFAS will send default information concerning the Student (if applicable) is the Information Trust Corporation. The current contact details of that bureau are:
 - 14.5.7. Telephone number: 011 214 6000
 - 14.5.8. Fax number: 011214 6001
 - 14.5.9. Website: www.transunion.co.za
- 14.6. The business of credit bureaus is to provide, to fee-paying clients, credit profiles and credit worthiness scores on the people about whom they keep credit-related information.
- 14.7. The Student is entitled, at any time and from time to time:
 - 14.7.7. To contact any credit bureau to which NSFAS refers information concerning defaulting borrowers.
 - 14.7.8. To require that credit bureau to disclose to the Student any information which NSFAS has sent to the bureau concerning the Student.
 - 14.7.9. To require the credit bureau to rectify any incorrect information kept or published by the bureau concerning the Student.
- 14.8. If the Student is employed and is obliged to but is failing to make repayments in terms of this Agreement, a further option available to NSFAS is to compel the Student's employer (in terms of Section 23 of the NSFAS Act) to make deductions from the Student's remuneration, and pay them over to NSFAS.
- 14.9. Another option available to NSFAS if the Student fails to make repayments in terms of this Agreement is to commence legal proceedings against the Student, as envisaged in clause 13.

15. CESSION

The Student will not be entitled to cede, assign or transfer any of his/her rights or obligations under this Agreement without the prior written consent of NSFAS. However, NSFAS will be entitled in its entire discretion and at any time to cede, assign and transfer any or all of its rights and/or obligations under this Agreement to any natural or juristic person of its choice.

16. FORMALITIES

- 16.1. These Bursary Conditions, as read together with the attached Schedule of Particulars and the Student's Funza Lushaka Bursary application and supporting documents, represent the entire Agreement between NSFAS and the Student. No variation of any provision of this Agreement will be effective unless it is in writing and signed by both the Student and NSFAS.
- 16.2. NSFAS is entitled to sign this Agreement by stamping it, or by electronic signature, as NSFAS chooses.
- 16.3. This Agreement will be presented to the Student by the Higher Education Institution which, in doing so, will be acting as the agent for NSFAS.

17. TERMINATION OF THIS AGREEMENT BY NSFAS

- 17.1. In terms of section 123 of the Credit Act:
 - 17.1.7. NSFAS is allowed to terminate this Agreement if the Student does not comply with it.
 - 17.1.8. If NSFAS did want to terminate this Agreement, it would have to take the steps set out in Part C of Chapter 6 of that Act.
- 17.2. However, NSFAS will not terminate this Agreement. If the Student does not comply with this Agreement, NSFAS will enforce its rights in terms of the Agreement, rather than terminate it.

18. ADDRESSES FOR RECEIVING DOCUMENTS

- 18.1. The Student chooses the postal home address recorded in paragraph 1 of the Schedule of Particulars as the address at which the Student will accept delivery of all statements and notices referred to in this Agreement, and all correspondence relating to it.
- 18.2. The Student chooses the residential home address recorded in paragraph 1 of the Schedule of Particulars as the address at which the Student will accept delivery of all pleadings or other legal process in connection with this Agreement.
- 18.3. The Student may deliver any notices or correspondence to NSFAS in terms of or relating to this Agreement to the fax number or the postal or e-mail addresses recorded in paragraph 4 of the Schedule of Particulars.
- 18.4. NSFAS chooses the physical address recorded in paragraph 4 of the Schedule of Particulars as the address at which it will accept delivery of all pleadings or other legal process in connection with this Agreement.
- 18.5. NSFAS and the Student may change their addresses (and NSFAS may change its fax number) by giving written notice of the new address or fax number, as the case may be. Any such notice may be delivered by hand, fax, registered post or e-mail.

19. STATUTORY INFORMATION On 31 May 2006 regulations were promulgated in terms of Credit Act in Government Gazette No. 28864. In this Agreement those regulations (as amended or replaced from time to time) will be referred to as "the Regulations". They oblige NSFAS to provide certain information to the Student:

- 19.1. Complaint to the National Credit Regulator ("the Regulator")
 - 19.1.7. If the Student believes that NSFAS has contravened the Credit Act, the Student may submit a complaint to the Regulator.

Student Initials

Institution Initials

Your ID Number																				
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19.1.8. Any such complaint must be submitted in the form and manner referred to in Regulation 50.

19.2. **Alternative Dispute Resolution:** As an alternative to submitting a complaint to the Regulator, the Student may refer an alleged contravention of the Credit Act by NSFAS to either:

19.2.7. A consumer court as defined in section 1 of the Credit Act; or

19.2.8. An alternative dispute resolution agent as contemplated in section 134(1)(b)(ii) of the Credit Act, for conciliation, mediation or arbitration.

19.3. **Application to Tribunal:** If the Student does not succeed, by way of the alternative dispute mechanism referred to above, in resolving any dispute with NSFAS concerning an alleged contravention of the Credit Act, the Student may apply for appropriate relief to the National Consumer Tribunal established in terms of section 26 of the Credit Act ("the Tribunal").

19.4. **Over-indebtedness**

19.4.7. The Student is entitled to apply to a debt counsellor to be declared over-indebted.

19.4.8. Any such application must be made in the manner set out in Regulation 24 of the Credit Act.

19.5. **Contact Details of the Regulator** The Regulator may be contacted at:

19.5.7. Telephone: 0860 627 627

19.5.8. Fax: 011 554 2860

19.5.9. Website: www.ncr.org.za

19.6. **Contact Details of the Tribunal** The Tribunal may be contacted at:

19.6.7. Telephone: 012 394 1450

19.6.8. Fax: 012 394 2450

COST OF CREDIT

·Loan Amount.

·Initial Annual Rate of Interest: Based on Commercial Interest Rates applicable on the date of signing this Agreement.

·The Rate of Interest may be varied (i.e.: increased or reduced) from time to time.

The Student is required to begin repaying the loan in monthly instalments when he/she starts earning more than R 30 000 per annum. The amount of each monthly instalment depends on the level of the Student's earnings, as appears in more detail from clause 7 of the attached Bursary Conditions. Because it cannot be predicted what the Student will earn, or when the Student will begin earning enough to oblige the Student to begin making repayments, it cannot be predicted how many instalments will be paid, how much any instalment will be, or how long the borrower will take to repay the loan.

Example of repayment period: If a student owes NSFAS R20 000 (with no further rebates) for the year 2007 and commences repayments in January 2008 at a rate of R378 per month (based on a monthly salary of only R5 000) and an interest rate of 7% then it will take the Student 5 years and 6 months to repay the loan.

·Deposit: Nil

·Initiation Fee: Nil

Service Fee: Nil

Insurance Contracts or Charges: Nil

Default Administration Charges: Nil

Student Initials

Institution Initials