

ANNUAL PERFORMANCE PLAN 2026/27

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EXECUTIVE AUTHORITY STATEMENT

The year 2026 represents the second year of implementation of Umalusi's five-year Strategic Plan. The 2026/27 Annual Performance Plan (APP) is informed by the National Development Plan (NDP), Priority 2 of the Medium-Term Development Plan (MTDP) (2024–2029) and other relevant government policies.

As the Quality Council for General and Further Education and Training, Umalusi is mandated to ensure and uphold quality standards within the basic education sector. Umalusi plays a crucial role in building public confidence in the education sector through its commitment to maintaining the credibility, quality and integrity of the assessment system. I look forward to ongoing collaboration as we work together to enhance educational outcomes in our country.

In the 2026/27 financial year, the Accounting Authority, the Umalusi Council, will monitor the implementation of this plan through structured performance reporting to assess progress, identify service delivery successes and challenges and provide strategic direction to management.



Ms Siviwe Gwarube: MP
Minister of Basic Education

ACCOUNTING AUTHORITY STATEMENT

Umalusi is dedicated to improving educational standards in South Africa to support quality education, as outlined in the NDP. The 2026/27 APP serves as the second plan within the MTDP 2024-2029 and outlines Umalusi's strategic commitments for this period.

Through this plan, Umalusi aims to ensure that qualifications registered on the General and Further Education and Training Qualifications Sub-framework (GFETQSF) are offered in a way that maintains their integrity and credibility. The credibility of Umalusi's qualifications is supported by a comprehensive set of quality assurance processes, all aimed at strengthening the integrity of the General and Further Education and Training system in South Africa.

Council is pleased by the attainment of a clean audit for the 2024/25 financial year. To maintain this performance, Council will work diligently to ensure that financial resources are used responsibly and that strong corporate governance is upheld. Additionally, Council will fulfil its oversight responsibilities through various committees, employing checks and balances to monitor and ensure the successful achievement of the focus areas outlined in the plan.

As the Chairperson of Umalusi Council, I am confident in the management's ability to fulfil the organisation's legislative mandate. The Council will fully support management in achieving the priorities set forth in the 2026/27 APP and will hold management accountable for meeting the targets and outputs specified in this plan.

Council endorses the 2026/27 APP and commits to supporting the Chief Executive Officer (CEO) and his team as they continue to focus on Umalusi's mission as a quality council.



Prof. Yunus Ballim
Chairperson: Umalusi Council

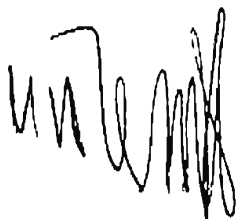
CHIEF EXECUTIVE OFFICER STATEMENT

I am pleased to share with our stakeholders that Umalusi has achieved a clean audit for the 2024/25 financial year, which marked the conclusion of the Medium-Term Strategic Framework (MTSF) for 2019–2024. This accomplishment is attributed to our rigorous organisational systems, including financial management, performance monitoring, good corporate governance and our ability to meet our targets. We are committed to maintaining this success during the 2024-2029 MTDP period.

The 2026/27 APP outlines the outputs and targets for all units to ensure that Umalusi continues to fulfil its legislative mandate. The key focus areas for implementation in this financial year include the following:

- i. Reviewing qualifications registered on the General and Further Education and Training Qualifications Sub-framework (GFETQSF);
- ii. Developing systems for e-certification and e-verification;
- iii. Conducting research on qualifications registered on the GFETQSF;
- iv. Creating platforms for intellectual engagement;
- v. Leverage digital platforms/tools to enhance the moderation process of question papers;
- vi. Intensifying feedback on the conduct of National Senior Certificate (NSC) examinations to the assessment bodies;
- vii. Enhancing moderators' competencies through blended training approaches to support continuous professional development and minimise errors in question papers;
- viii. Ensuring accurate and fair marking through the standardisation of marking guidelines and verification of marking processes; and
- ix. Advocating the requirements for the accreditation of registered independent online schools.

I want to assure Umalusi stakeholders that the Executive Management is committed to implementing this APP with the dedicated support of our staff to achieve the desired outcomes. As a result, this plan will be implemented through the 2026/27 annual operational plan. Progress against planned targets will be monitored through our mid-year performance reviews to assess each unit's performance and ensure accountability.

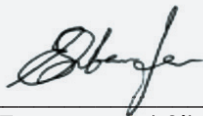


Dr Mafu S Rakometsi
Chief Executive Officer

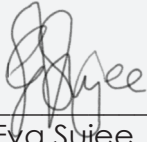
OFFICIAL SIGN-OFF

It is hereby certified that this Annual Performance Plan:

- Was developed by the management of Umalusi under the guidance of the Umalusi Council;
- Takes into account all relevant policies, legislation and other mandates for which Umalusi is responsible; and
- Accurately reflects the outcomes and outputs that Umalusi will endeavour to achieve in the period 2026/27.




Dr Emmanuel Sibanda
Executive Manager: Qualifications and Research



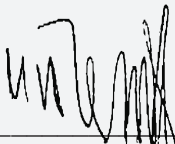
Dr Eva Sujee
Executive Manager: Quality Assurance and Monitoring



Mr Hendrik van der Walt
Chief Financial Officer



Ms Molly Mokoena
Senior Manager: Strategy and Governance



Dr Mafu S Rakometsi
Chief Executive Officer



Prof. Yunus Ballim
Umalusi Council Chairperson

Approved by:



Ms Siviwe Gwarube: MP
Minister of Basic Education

ABBREVIATIONS AND ACRONYMS

ACC	Accreditation Committee of Council
AEAA	Association for Educational Assessment in Africa
AET	Adult Education and Training
AI	Artificial Intelligence
CAPS	Curriculum Assessment Policy Statement
CAT	Common Assessment Task
CAT	Credit Accumulation and Transfer
CEO	Chief Executive Officer
CFO	Chief Financial Officer
CHE	Council on Higher Education
DBE	Department of Basic Education
DHET	Department of Higher Education and Training
E&A	Evaluation and Accreditation
ECD	Early Childhood Development
EE	Employment Equity
ETDP SETA	Education, Training and Development Practices Sector Education and Training Authority
F&SCM	Finance and Supply Chain Management
FET	Further Education and Training
FY	Financial Year
GBVF	Gender-Based Violence and Femicide
GEC	General Education Certificate
GENFETQA	General and Further Education and Training Quality Assurance
GETC	General Education and Training Certificate
GETC: ABET	General Education and Training Certificate: Adult Basic Education and Training
GFET	General and Further Education and Training
GFETQSF	General and Further Education and Training Qualifications Sub-framework
GNU	Government of National Unity
HCM	Human Capital Management
HRD	Human Resource Development
IA	Internal Auditors
ICASS	Internal Continuous Assessment/s
ICT	Information and Communication Technology

IEB	Independent Examinations Board
IS	Independent Schools
ISAT	Integrated Summative Assessment Task/s
JMB	Joint Matriculation Board
LGBTQIA+	Lesbian, Gay, Bisexual, Transgender, Queer, Intersex and Asexual Plus
MID	Mild-To-Moderate Intellectual Disabilities
MIS	Management Information System
MTbBE	Mother Tongue-based Bilingual Education (Strategy)
MTDP	Medium-Term Development Plan
MTEF	Medium-Term Expenditure Framework
MTSF	Medium-Term Strategic Framework
MTT	Ministerial Task Team
NASCA	National Senior Certificate for Adults
NATED	National Accredited Technical Education Diploma
NC(V)	National Certificate (Vocational)
NCS	National Curriculum Statement
NDP	National Development Plan
NGO	Non-Governmental Organisation
NLRD	National Learners' Records Database
NPC	National Planning Commission
NQF	National Qualifications Framework
NSC	National Senior Certificate
OS	Operating System
PAT	Practical Assessment Task/s
PED	Provincial Education Department/s
PESTEL	Political, Economic, Social, Technological, Environmental and Legal
PFMA	Public Finance Management Act
PMDS	Performance Management Development System
PR & Comms	Public Relations and Communications
Q&R	Qualifications and Research
QAA	Quality Assurance of Assessment
QAA: PSQ	Quality Assurance of Assessment: Post-School Qualifications
QAA: SQ	Quality Assurance of Assessment: School Qualifications
QAM	Quality Assurance and Monitoring
QCC	Qualifications, Curriculum and Certification
QCTO	Quality Council for Trades and Occupations
QP	Question Paper

RFQ	Request for Quotation
RPL	Recognition of Prior Learning
S&G	Strategy and Governance
SCM	Supply Chain Management
SACAI	South African Comprehensive Assessment Institute
SACE	South African Council for Educators
SADC	Southern African Development Community
SAQA	South African Qualifications Authority
SBA	School-Based Assessment/Site-Based Assessment
SC(a)	Senior Certificate (amended)
SCM	Supply Chain Management
SDGs	Sustainable Development Goals
SIR	Statistical Information and Research
SITA	State Information Technology Agency
SoS	Schools of Skills
SLA	Service Level Agreement
SWOT	Strengths, Weaknesses, Opportunities and Threats
TIDs	Technical Indicator Descriptions
TVET	Technical and Vocational Education and Training
USAf	Universities South Africa



PART A: **OUR MANDATE**

1. LEGISLATIVE AND POLICY MANDATES

1.1 FOUNDING LEGISLATION

a. National Qualifications Framework (NQF) Act (Act No. 67 of 2008, as amended)

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

- i. Develop and implement policy for quality assurance;
- ii. Ensure the integrity and credibility of quality assurance; and
- iii. Ensure that any quality assurance necessary for the sub-framework is undertaken.

b. General and Further Education and Training Quality Assurance (GENFETQA) Act (Act No. 58 of 2001, as amended)

The GENFETQA Act, as amended, assigns Umalusi the responsibility for the quality assurance of general and further education and training. Umalusi was established to maintain norms and standards in General and Further Education and Training (GFET). Its mandate is expressed, amongst others, as follows:

- i. Quality assurance of all exit-point assessments of such qualifications;
- ii. Certification of learner achievements;
- iii. Quality assurance of private education institutions; and
- iv. Accreditation of private assessment bodies.

Concerning the quality assurance of private provision of the enacted and assessed curriculum, Umalusi is required to undertake the following accreditation responsibilities, as outlined in Chapter 3, 23(2):

- i. Develop policy, which must be regulated by the Minister, for the accreditation of private assessment bodies other than departments of education, and accredit assessment bodies accordingly;
- ii. Develop policy and criteria for the quality assurance of private education institutions, including Independent Schools (IS), private Further Education and Training (FET) colleges or private Adult Education and Training (AET) colleges; and
- iii. Monitor accredited private assessment bodies and private education institutions, and affirm or withdraw the accreditation status of the private education institutions concerned.

1.2 OTHER LEGISLATION

- i. National Education Policy Act No. 27 of 1996, as amended;
- ii. South African Schools Act No. 84 of 1996, as amended; and
- iii. Continuing Education and Training Act No. 16 of 2006, as amended.

2. POLICY MANDATES

2.1 NATIONAL DEVELOPMENT PLAN 2030

The National Development Plan (NDP) is a policy document developed by the National Planning Commission (NPC) in 2012 with an aim to eliminate poverty and reduce inequality by 2030. It is a guiding vision for planning in South Africa.

Umalusi, as the Quality Council in General and Further Education And Training, finds its feet in Chapter 9 of the NDP, on the theme of improving education, training and innovation.

Chapter 9 advocates for an inclusive curriculum that emphasises literacy, mathematics and science, as well as African languages. Through its sub-framework of qualifications, Umalusi therefore ensures that minimum standards are met in implementing these curricula, through the appraisal of the intended curriculum for all qualifications in the General and Further Education and Training Qualifications Sub-framework (GFETQSF). This process also ensures articulation between the qualifications of schools, colleges and higher education institutions offered at NQF Levels 1–4.

As a developmental state, South Africa recognises the private provision of education to afford citizens a choice on the type of institutions they wish to select for their children's education. Critical to the private provision of education is the mandatory registration of private education institutions with the relevant education departments and the accreditation of all private education institutions that intend to offer qualifications on Umalusi's sub-framework. The accreditation process is a means of ascertaining the capacity of independent institutions to provide tuition and assess learners in line with the standards set for the respective qualifications. Umalusi's mandate requires the management of qualifications on the sub-framework, hence research and innovation are central to maintaining standards to ensure the quality and credibility of qualifications in general and further education and training.

Therefore, in the spirit of the NDP, Umalusi collaborates with like-minded organisations in the Southern African Development Community (SADC), in Africa and internationally, to share experiences on matters related to assessment and quality assurance.

2.2 2024–2029 MEDIUM-TERM DEVELOPMENT PLAN (MTDP)

As a result of the South African general election on 29 May 2024, the 7th Administration, known as the Government of National Unity (GNU), was announced at the end of June 2024. In outlining the MTDP 2024–2029, the President of the Republic of South Africa, Mr Cyril Ramaphosa, outlined three key priorities for the new administration:

- i. To drive inclusive growth and job creation;
- ii. To reduce poverty and tackle the high cost of living; and
- iii. To build a capable, ethical and developmental state.

These priorities are aligned with international and national policies, such as the United Nations Sustainable Development Goals (SDGs) and the NDP 2030, which also emphasise reducing poverty and addressing the high cost of living. In this context, Umalusi is committed to enhancing educational standards at the general and further education levels, ensuring that qualifications remain credible and aligned with the country's economic needs. For the 2025–2030 planning period, Umalusi has established guiding principles to drive its efforts towards transforming and positively impacting South Africa's education system.

2.3 INSTITUTIONAL POLICIES AND STRATEGIES OVER A FIVE-YEAR PERIOD

The work of Umalusi must be considered in line with the following documents:

- i. Policy for the General and Further Education and Training Qualifications Sub-framework: 2014;
- ii. Guidelines on Strategy and Priorities for the NQF 2011/2012: Minister of Higher Education and Training;
- iii. Policy documents and guidelines pertaining to the National Senior Certificate (NSC), Senior Certificate, as amended (SC[a]), General Education and Training Certificate: Adult Basic Education and Training (GETC: ABET), National Certificate (Vocational) (NC[V]), National Accredited Technical Education Diploma (NATED) Report 190/191 Engineering Studies N2-N3 and the National Curriculum Statement (NCS); and any other qualifications on the GFETQSF, as applicable;
- iv. Directives for Certification by Umalusi for qualifications on the GFETQSF;
- v. Requirements and Specifications for the Standardisation, Statistical Moderation and Resulting for Qualifications on the GFETQSF;
- vi. The regulations pertaining to qualifications on the GFETQSF developed by the Department of Basic Education (DBE) and gazetted by the Minister on assessment and certification, including those promulgated by provincial legislatures;
- vii. The policy and criteria for the development, registration and publication of qualifications on the GFETQSF;
- viii. The Policy for the Re-issue of National Certificates;
- ix. Policy for the Certification of Candidate Records on the GFETQSF;
- x. The Recognition of Prior Learning (RPL) Policy;
- xi. The Policy for Credit Accumulation and Transfer (CAT);
- xii. Umalusi Articulation Policy for Qualifications in the General and Further Education and Training Qualifications Sub-Framework;
- xiii. National Treasury Regulations; and
- xiv. Any other appropriate legislation or Umalusi Council policy and directive related to the various education and training sectors in which Umalusi is mandated to work.

3. RELEVANT COURT RULINGS

None.



PART B:
**OUR STRATEGIC
FOCUS**

1. UPDATED SITUATIONAL ANALYSIS

The organisation employed various analytical tools to conduct a situational analysis of its internal and external environments. A combined Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis, along with a Political, Environmental, Social, Technological, Economic and Legal (PESTEL) analysis, was used to assess the organisation's position, both internally and externally. Additionally, a problem- and solution-tree was utilised to gather information about the issues the organisation aims to address over the MTDP period.

The analysis reveals that the registration and certification of candidates from unaccredited institutions remains a significant challenge. Assessment bodies need to establish systems that effectively manage learner registrations for examinations at both accredited institutions and those currently seeking accreditation.

The NATED N1 and N2 programmes were phased out in August 2024 and April 2025, respectively. The last examination cycle for the NATED N3 programme was November 2025. The Department of Higher Education and Training (DHET) is retaining selected NATED N2 subjects to support articulation for Grade 12 learners interested in occupational programmes.

Moreover, unaccredited institutions pose a threat to the credibility of our qualifications. In response, the organisation actively promotes public awareness and education through various platforms. Budget constraints remain an obstacle for the organisation to fully deliver on its incremental mandate. To tackle this challenge, Umalusi is exploring the development of an alternative funding model as a long-term solution.

Table 1: Combined PESTEL and SWOT analysis

	Strengths	Weaknesses	Opportunities	Threats
Political	<p>Umalusi is a public entity in terms of Schedule 3A of the Public Finance Management Act (PFMA) and is established by the GENFETQA and NQF Acts, ensuring institutional stability and authority</p> <p>Umalusi is a non-partisan organisation that is autonomous</p>	<p>New political environment influenced by the dynamics of the 7th Administration – Government of National Unity (GNU)</p> <p>Reluctance/delay in implementing government policies by the GNU</p>	<p>The new administration presents an opportunity for Umalusi’s directives and advice to be accepted</p> <p>Presenting Umalusi work (advocacy initiatives)</p>	<p>The new administration is still settling in terms of political expectancy and relational development</p> <p>The dynamics of the 7th Administration have resulted in instability, especially in the Provincial Education Departments (PED)</p> <p>It may take time for the new administration to settle and understand various educational policies</p> <p>Conflict of interest regarding standardisation of learner marks</p> <p>Misunderstanding of the Umalusi mandate</p> <p>Late approval of the budget</p> <p>Advice given in terms of development in the sector is not binding</p>

	Strengths	Weaknesses	Opportunities	Threats
<p>Economical</p>	<p>Regular allocation from the DBE and own revenue from verification, accreditation and certification services</p> <p>Sound financial position-</p> <p>Effective internal control environment</p> <p>Good budget management</p>	<p>Umalusi does not have a policy to raise revenue from quality assurance services across all assessment bodies</p> <p>Dependency on the DBE allocation might compromise the organisation's autonomy</p> <p>Umalusi is dependent on the State Information Technology Agency (SITA) for some functionalities, which is costing the organisation a lot of money</p> <p>Inadequate grant allocation to pursue Umalusi's increasing scope</p>	<p>Development of a funding model to ensure the financial sustainability of Umalusi's operations</p> <p>Generation of revenue from the quality assurance of foreign qualifications and other modes of curriculum provision</p> <p>Financial benefits from collaboration with potential sponsors</p> <p>Umalusi has an opportunity to influence the regulation of online schools and Grade R and raise revenue from accreditation and quality assurance services</p>	<p>There is are misconceptions of educational policies</p> <p>Blurred roles and responsibilities between Umalusi and public assessment bodies</p> <p>Delayed payment by assessment bodies, which might affect the financial position of the organisation</p> <p>Dependency on the DBE allocation might compromise the organisation's autonomy</p> <p>Reliance on SITA (high-cost implications)</p> <p>Delayed payments for verification services by service providers</p>

	Strengths	Weaknesses	Opportunities	Threats
Social	<p>Umalusi has a strong brand</p> <p>Learners have confidence in Umalusi's ability to resolve their certification issues</p> <p>Communication and sharing of information with the public</p> <p>Career development is supported through financial study assistance</p> <p>Continuous improvement in conditions of service</p> <p>Community involvement/development projects</p>	<p>Limited human capacity to support the mandate of Umalusi</p> <p>Loss of skilled and experienced personnel can lead to significant organisational instability, including the erosion of institutional memory, disruption of established processes and reduced capacity to maintain quality and continuity in operations</p>	<p>Umalusi has an opportunity to automate some processes in order to improve service delivery</p> <p>Conduct an employee satisfaction survey</p> <p>Collaboration with institutions of higher learning</p>	<p>Not issuing certificates on time might cause reputational harm to the organisation</p> <p>Fraudulent activities (certificates) might harm the reputation of Umalusi</p> <p>Prevalence of sales of fraudulent certificates</p> <p>Selling of fraudulent certificates for income or others obtaining fraudulent certificates to get employment</p> <p>Unregulated online schools are a threat to Umalusi's public image</p>
Technological	<p>Umalusi has automated business processes e.g., the online replacement certification</p> <p>Migration to the Cloud</p> <p>Online Performance Management Development System (PMDS)</p> <p>Online recruitment system in place</p>	<p>Legacy systems, such as Management Information System (MIS)</p> <p>The lack of an online external claims process causes possible payment delays</p> <p>Umalusi has infrastructure for staff to work from home, however, Umalusi does not have a policy to regulate working from home</p>	<p>Strong ICT infrastructure presents an opportunity for Umalusi to generate more income relating to certification</p> <p>An opportunity to improve ICT systems</p> <p>With technological advancements, the organisation has an opportunity to 'go green'. This will have a positive spinoff on the environment as less paper will be used</p>	<p>Resistance from Umalusi and stakeholders to transitioning from manual processes to online systems may cause delays in implementation, lower adoption rates and operational challenges</p>

	Strengths	Weaknesses	Opportunities	Threats
Environmental	<p>Umalusi has state-of-the-art infrastructure to enhance system accessibility, collaboration and support remote working</p> <p>Online processes reduce the organisation's paper usage</p> <p>Umalusi owns its buildings</p> <p>Umalusi buildings have backup power and water tanks, which allows business continuity during loadshedding and water outages</p>	<p>Manual recording of institutions' accreditation history. The new system cannot be used to update accredited institutions on our website, leading to misrepresentation of accredited institutions</p> <p>One office, no provincial/regional offices</p> <p>Currently, the EE targets have not been met. Non-adherence to EE targets will lead to financial penalties imposed on the organisation</p>	<p>An opportunity to leverage Artificial Intelligence (AI)</p> <p>Going paperless</p> <p>Improved compliance with submission timelines</p> <p>Training all employees</p> <p>Shorten the recruitment process</p> <p>Develop an external online claims system to shorten the payment process</p> <p>Umalusi has an opportunity to influence the regulation of online schools and charge them for accreditation and quality assurance services</p> <p>To rationalise the curricula underpinning GFETQSF qualifications to address climate issues of sustainability</p> <p>Expanding the advertising of vacancies to target specifically designated groups</p> <p>Office renovations</p>	<p>Client overflow to Umalusi Office because there is only one office</p>

Strengths	Weaknesses	Opportunities	Threats
<p>Umalusi is guided by a legislative framework and operates within a stable environment</p>	<p>Umalusi does not have a legal service unit; however legal services are contracted when required</p> <p>Turnaround on the development of legal templates for legal use, e.g., non-disclosure agreements</p> <p>Non-compliance with fire regulations and accessibility to Umalusi building for people living with disabilities</p>	<p>An opportunity to seek legal advice from other government organisations/ departments (state law adviser)</p> <p>Refurbishment of Umalusi building to address non-compliance issues identified</p> <p>Access good legal minds</p>	<p>Delayed presentation of certificates to clients and accreditation status on Umalusi's website might cause legal suits and reputational damage</p> <p>Institutions that are not granted accreditation have the legal right to challenge Umalusi</p> <p>The move of the Matriculation Board to Umalusi will require additional resources from Umalusi should the proposed move be successful</p> <p>Lack of regulation for online schools</p> <p>Withholding of results of candidates who have allegedly been implicated in examination irregularities</p> <p>Confusion regarding the registration of examination centres for schools applying for accreditation. Possible litigation associated with the registration of examination centres and accreditation with the PED</p>

2. EXTERNAL ENVIRONMENT ANALYSIS

2.1 UMALUSI CONTRIBUTION TO THE 2024–2029 MTDP

Umalusi contributes to Priority 2: Reduce poverty and tackle the high cost of living of the MTDP. In line with this, the organisation has developed five priorities to deliver on its policy mandate for the 2024–2029 MTDP period. The priorities are:

- i. Reviewing the quality assurance approach;
- ii. Reviewing, evaluating and appraising qualifications submitted for registration on the GFETQSF;
- iii. Providing input to the legislative framework;
- iv. Intensifying research on educational developments to inform the quality assurance processes and provide direction to the work of Umalusi; and
- v. Sharpening advocacy work in the mandate of Umalusi.

While the organisation is not directly responsible for achieving the NDP and MTDP targets, the organisation works collaboratively with stakeholders in the education sector towards achieving them. Umalusi ensures improved assessments at the exit levels of all qualifications registered on the GFETQSF of the NQF, through quality assurance processes. This is achieved through:

- i. Moderation of assessment instruments (examination question papers, Practical Assessment Tasks (PAT), Integrated Summative Assessment Tasks (ISAT) and Life Orientation Common Assessment Tasks (CAT));
- ii. Monitoring and moderation of internal assessments (School Based Assessment/ Site Based Assessment [SBA], orals, internal continuous assessment [ICASS] and ISAT/PAT);
- iii. Audit of the state of readiness to conduct examinations;
- iv. Audit of appointed markers;
- v. Monitoring of the conduct, administration and management of assessment and examination processes;
- vi. Standardisation of marking guidelines;
- vii. Monitoring and verification of marking;
- viii. Management of concessions and examination irregularities;
- ix. Standardisation of assessment outcomes;
- x. Approval of release of results; and
- xi. Evaluation, accreditation and monitoring of private assessment bodies to determine the quality of provision.

In addition to the MTDP priorities, Umalusi also aligns its work with the priorities of the DBE. During the current MTDP period, the DBE has identified key priorities for implementation. These include:

- i. Mass registration for Early Childhood Development (ECD);
- ii. Improve literacy and numeracy;
- iii. Inclusive education;
- iv. Strengthen and improve curriculum; and
- v. Three-stream model.

Table 2 details Umalusi's contribution in aligning with the MTDP targets.

Table 2: Umalusi contribution to 2024–2029 MTDP

MTDP priority	Outcomes	Outcome Indicator	Outcome Targets 2029/30	Strategic Intervention	Umalusi's contribution
<p>Strategic Priority 2: Reduce poverty and tackle the high cost of living</p>	<p>Improved education outcomes and skills</p>	<p>Proportion of Grade 3 learners reaching the required competency levels in numeracy skills as assessed through the South African Systemic Evaluation by 2029</p>	<p>Reading above evolving level: 40%</p> <p>Numeracy above evolving level: 54%</p>	<p>Provide mother-tongue-based home language workbooks to schools offering the foundation phase (within the framework of the National Reading Literacy Strategy 2024-2030)</p> <p>Provide mother-tongue-based Mathematics workbooks to schools offering the foundation phase (within the framework of the Mother-Tongue-Based Literacy Strategy)</p>	<ul style="list-style-type: none"> Umalusi is currently drafting a ministerial advice based on the Mother Tongue-based Bilingual Education (MTbBE) Strategy, as engaged through Umalusi's Research Forum. This advice covers Umalusi's evaluation of the strengths and areas of improvement, with particular interest on the bearing that this strategy has for Umalusi as a quality council In preparation for the national assessments for Grade 4 Mathematics and Natural Sciences and Technology within the framework of MTbBE, Umalusi was invited to support the initiative by presenting the Umalusi framework on effective questioning in July 2025

MTDP priority	Outcomes	Outcome Indicator	Outcome Targets 2029/30	Strategic Intervention	Umalusi's contribution
	Vocational and Occupational subjects in special schools expanded	The 3 diverse pathways appropriately introduced in special schools	Scale up the implementation of the occupational and vocational curriculum in special schools	<ul style="list-style-type: none"> Investigating the implementation of occupation-oriented curricula within Schools of Skills (SoS) for mild-to-moderate learners: the purpose of this research is to explore how occupation-oriented curricula for the years 1–4 skills programme are being implemented in SoS for learners with Mild-To-Moderate Intellectual Disabilities (MID), across the country The study above will provide information to the project, titled "Towards the development of a qualification for Schools of Skills". This project will provide a basis for the development of a concept document that will propose standards for the development of a qualification for learners with MID 	

2.2 ORGANISATIONAL PERFORMANCE ENVIRONMENT

2.2.1 Accreditation

As reflected in Figure 1, from April to December 2025, 76 private education institutions were granted accreditation, 35 were awarded two-year provisional accreditation and 31 had a 'no accreditation' outcome. A further 54 institutions did not meet the requirements for accreditation at the first consideration of verified evidence and were given a window period to improve. In addition, 190 identified private education institutions were monitored after being granted accreditation.

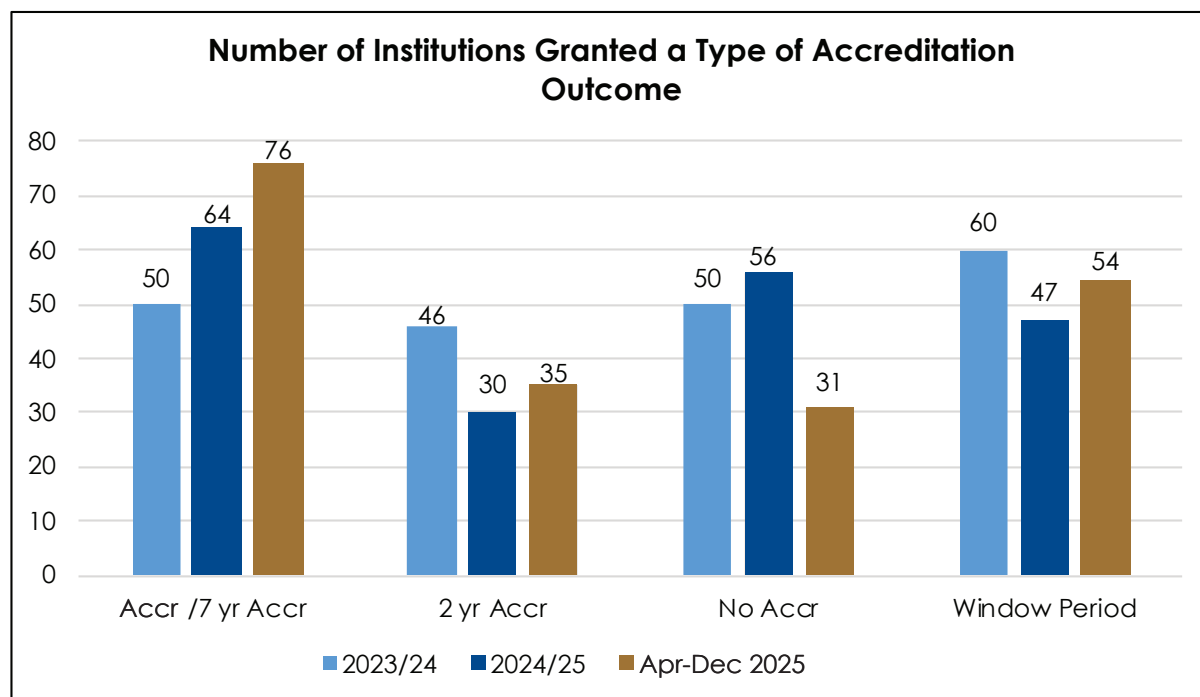


Figure 1: Number of institutions granted a type of accreditation outcome (2023/24 – Dec 2025)

Across the three reporting periods represented in Figure 1, the proportion of institutions not meeting accreditation requirements (that is, those receiving 'no accreditation' or a window period to improve) has remained relatively constant at an average of 53%. In 2023/24, 110 institutions (59%) received either no accreditation or a window period to improve, compared to 103 institutions (55%) in 2024/25. However, the April–December 2025 period reflects a positive shift, with this outcome recorded for 85 institutions (43%). The data thus suggests an emerging improvement in institutional compliance, indicating that a greater proportion of institutions were able to meet the accreditation requirements.

Looking more closely at individual accreditation outcomes, the data show a differentiated pattern of performance across reporting periods. Institutions granted accreditation or seven-year accreditation increased steadily from 50 in 2023/24 to 64 in 2024/25 and, further, to 76 in the April–December 2025 period, suggesting gradual improvement among institutions able to meet the full accreditation requirements.

In contrast, the number of institutions granted two-year accreditation declined, from 46 in 2023/24 to 30 in 2024/25, before increasing slightly to 35 in April–December 2025. This indicates renewed movement into partial compliance, albeit not yet at earlier levels.

At the same time, outcomes reflecting non-compliance remain substantial. Institutions receiving no accreditation increased from 50 in 2023/24 to 56 in 2024/25, before declining to 31 in the April–December 2025 period; thus pointing to a reduction in outright non-compliance in the most recent data. However, this improvement is partially offset by the persistently high number of institutions granted a window period to improve, which decreased from 60 in 2023/24 to 47 in 2024/25, but rose again to 54 in April–December 2025.

Although institutions attend a Quality Promotion meeting at the start of the accreditation process, where the requirements for accreditation are clearly outlined, the recent data show a more nuanced picture. While the number of institutions achieving full accreditation, or seven-year accreditation, has increased steadily, a considerable proportion of institutions continue to receive no accreditation or are granted a window period to improve. This suggests that although progress is evident, many institutions still require targeted support and greater application of rigorous processes to consistently meet accreditation standards.

2.2.2 Certification

Certification is the formal recognition of a qualification, or part-qualification, awarded to a successful candidate. Umalusi fulfilled its mandate and issued certificates to all candidates who qualified and complied with the requirements for a qualification, or who passed one or more subjects.

The certification of candidates in an academic year, January to December, does not always coincide with the financial year, as is clearly depicted on the graph in Figure 2. Certificates are issued based on requests from the PED and the private assessment bodies once they have completed their processes. In the 2023/24 financial year, most of the candidates (1 496 504) for the 2022 and 2023 academic year were certified.

Umalusi printed and issued 227 850 certificates from 1 April 2025 to 31 December 2025. This number includes the overflow of the 2024 cohort of candidates who were not certified in the 2024/25 financial year. It is expected that the 2025 cohort will be certified in the next quarter. This is reflected in Figure 2.

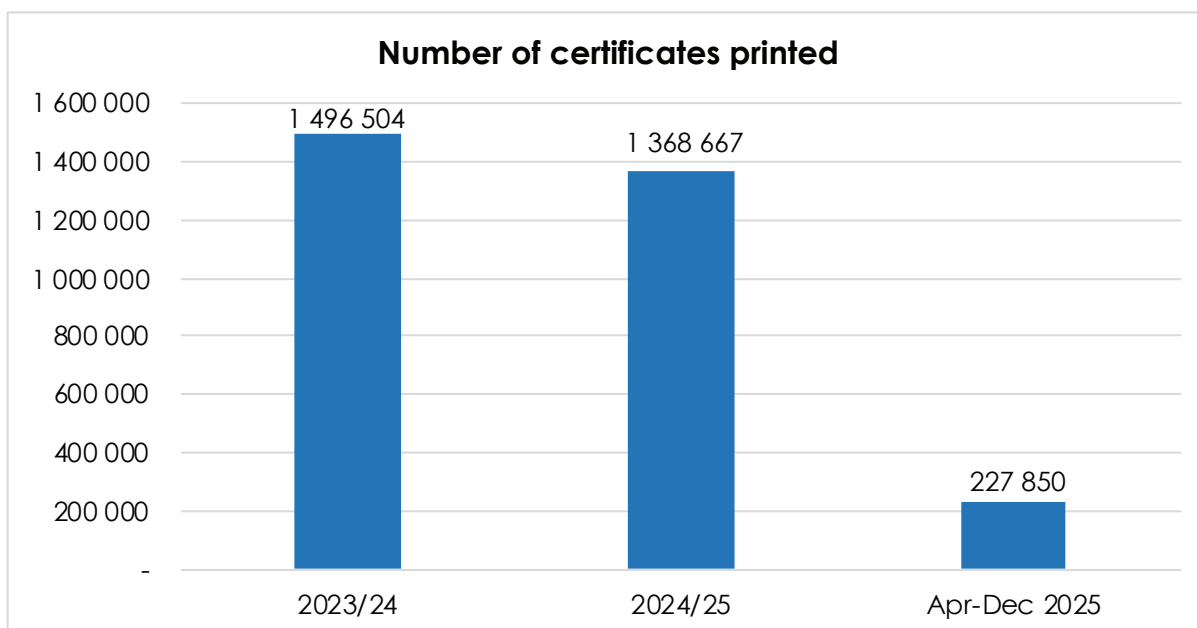


Figure 2: Certification statistics for 2023/24 – Dec 2025

2.2.3 Online certificate replacement system

Umalusi developed and implemented an online application system for the replacement of lost or damaged certificates in the 2022/23 financial year. The purpose of this system is to provide effective and efficient service to candidates who need to replace certificates. Enhancements to the online system are being made regularly to improve the system's effectiveness. Future enhancements will focus on integration with the courier company to improve the delivery time and communication with candidates, via SMS services.

The online certificate replacement system has issued 38 525 certificates to date (since inception of the online system). In the first three quarters of this financial year 13 377 replacement certificates were issued. The demand for this service has grown rapidly. As a result, enquiries, couriers and collection of certificates have also increased. This has put a strain on the existing capacity constraints to deliver fully on this.

2.2.4 Verification

Verification is the process followed by Umalusi to establish the authenticity of qualifications/certificates. Verification includes authenticating the qualification documents and verifying that the qualification was awarded to the individual in question; and that the content corresponds with the details on the Umalusi certification database. The number of verifications undertaken in 2024/25 totalled 461 015; this includes 7 691 manual confirmations, 429 207 e-verifications and 24 127 full verifications. In the first three quarters of the 2025/26 financial year, Umalusi has verified 327 251 qualifications/certificates; this includes 5 768 manual confirmations, 302 528 e-verifications and 18 955 full verifications. Figure 3 shows the trend over the last two years and Q1-3 of the current financial year, with a yearly increase in verifications.

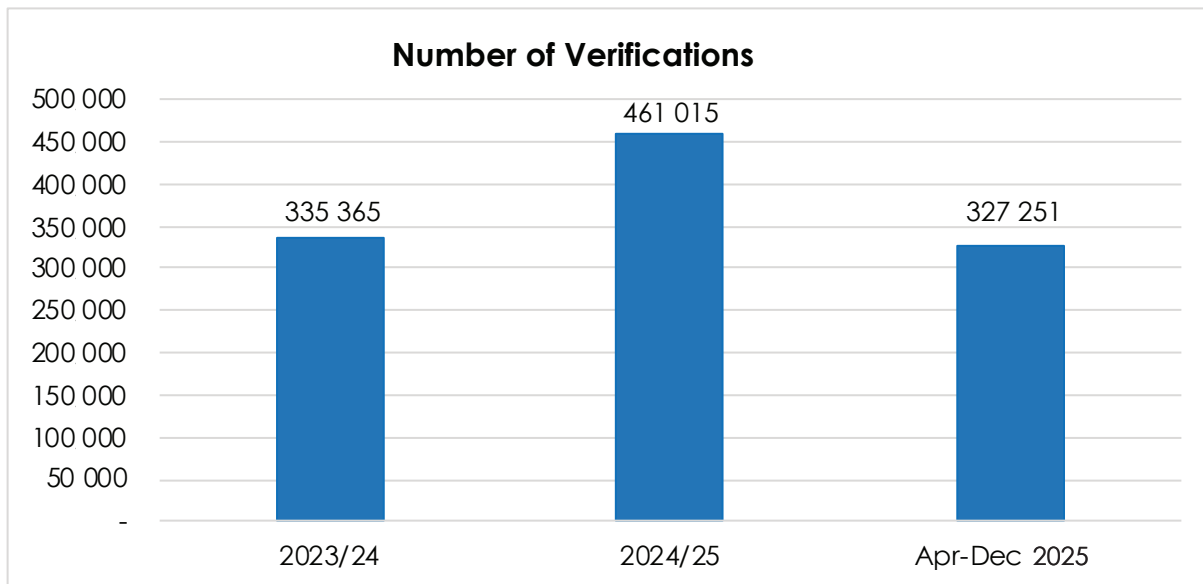


Figure 3: Verification statistics for 2023/24 – Dec 2025

2.2.5 Quality Assurance of Assessment

Since its establishment, Umalusi has carried out Quality Assurance of Assessment (QAA) processes as part of its core mandate for all qualifications within its sub-framework. These processes include moderating question papers; monitoring sites for SBA, ISAT, PAT and ICASS; overseeing the writing and marking of examinations at various centres; verifying marking; auditing the readiness of assessment bodies to conduct examinations; and engaging in other quality assurance-related activities.

These activities are conducted across all qualifications registered on the GFETQSF and across all assessment bodies; namely the DBE, DHET, Independent Examinations Board (IEB) and South African Comprehensive Assessment Institute (SACAI).

Figures 4 to 7 illustrate selected QAA processes undertaken by Umalusi over the past three years.

2.2.6 Moderation of question papers

Umalusi moderates question papers for all qualifications registered on the GFETQSF to ensure they meet the required standards. This process guarantees that the papers are valid, fair and reliable.

In the 2023/24 financial year, Umalusi moderated and approved a total of 528 NSC question papers from the DBE, IEB and SACAI. In 2024/25, this number increased by 11, bringing the total to 539. The increase was due to additional question papers, which were developed to accommodate:

- i. Candidates who missed exams due to unforeseen circumstances;
- ii. Approved question papers that were compromised and required replacements; and
- iii. Banked question papers that were used and, consequently, had to be replaced.

The DHET June and November 2023/24 GETC: ABET examination question papers were moderated and approved 18 months before the commencement of the examinations. The number of question papers moderated and approved for post-school qualifications decreased, from 551 in 2023/24 to 547 in 2024/25. The decrease was due to the use of backup question papers for GETC and, unlike in 2023/24, there were no additional learning areas assessed by the IEB for GETC: ABET mid-year examinations.

In the first quarter of the 2025/26 financial year, Umalusi approved 322 question papers, comprising 235 from the schools sector and 87 from the post-schools sector.

In Quarter 2, the number of question papers moderated increased across both school and post-school qualifications. This rise was driven by the setting of backup papers and the finalisation of sets for the November examinations. In Quarter 3, fewer question papers were set as the focus shifted to finalising backup papers and preparing the March 2026 supplementary examination papers.

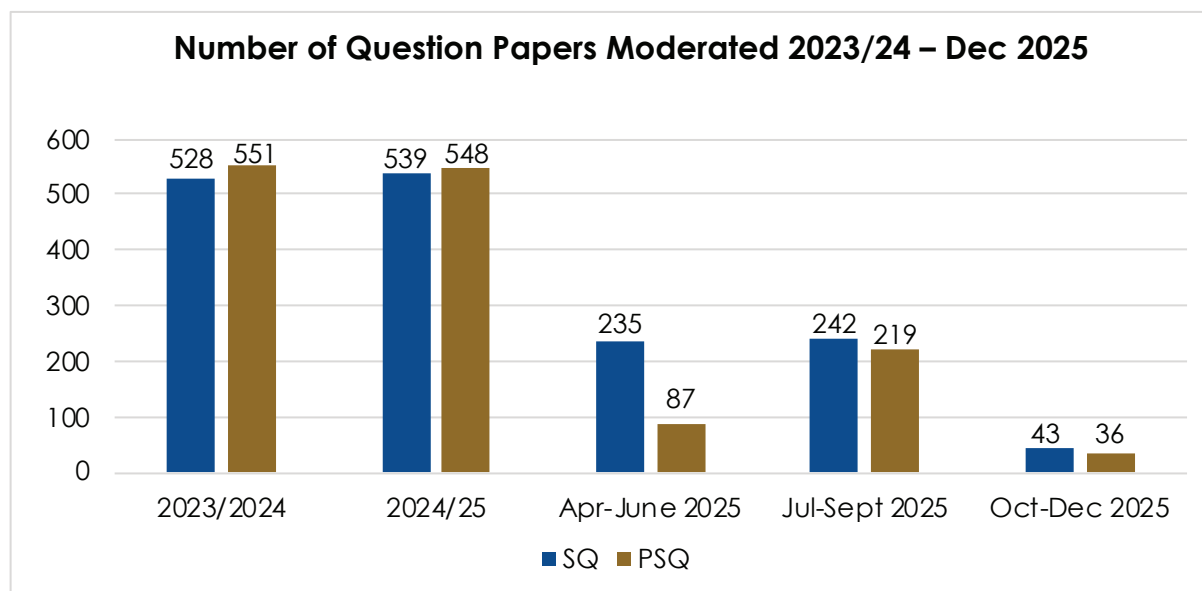


Figure 4: Number of question papers moderated (2023/24 – Dec 2025)

2.2.7 Monitoring the writing of examinations

Umalusi conducts oversight monitoring of examination writing for qualifications registered on the GFETQSF at selected examination centres. The purpose of this monitoring is to assess whether the assessment bodies conduct, administer and manage examinations in line with the regulations governing national examinations. This ensures the credibility of the assessment process and the production of valid and reliable results.

During the 2024/25 financial year, the schools sector recorded a moderate increase in the number of monitored examination centres, rising from 454 in 2023/24 to 580. This growth reflects Umalusi's strategic objective of expanding monitoring coverage annually. However, in the June 2025/26 examination period the number of monitored centres declined, from 153 in 2024/25 to 101 in 2025/26. In Quarter 2, no examinations were conducted across the three assessment bodies administering the NSC.

By Quarter 3, monitoring was undertaken during the November 2025 NSC examinations at 280 centres across the IEB, SACAI and DBE.

The number of centres monitored for the writing of examinations in the post-school sector declined from 315 in 2023/24 to 289 in 2024/25, primarily due to reduced budget allocations. Between April and June 2025/26, Umalusi monitored 85 examination centres in the post-school sector. In Quarter 3, two examination cycles administered by the DHET and IEB were monitored. During this period, the number of centres monitored increased across both school and post-school qualifications, as nine end-of-year national examinations were conducted by four assessment bodies.

Figure 5 summarises the number of examination centres monitored.

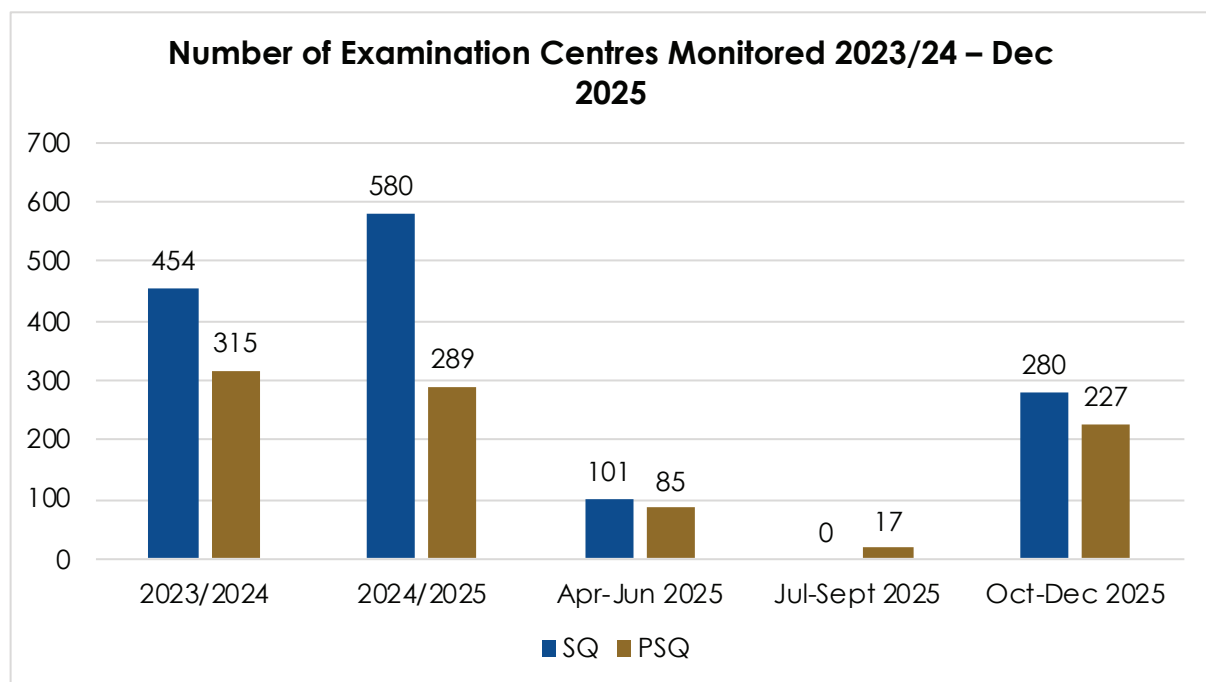


Figure 5: Number of examination centres monitored (2023/24 – Dec 2025)

2.2.8 Monitoring of marking centres

Umalusi monitors the marking of examinations administered by the DBE, DHET, IEB and SACAI to ensure that marking standards are upheld and that the process complies with regulations governing the conduct, administration and management of national examinations. This oversight helps maintain the integrity and credibility of the marking process and ensures consistent application of national standards.

In the 2023/24 financial year, Umalusi monitored 43 marking centres. This number increased by 12 in 2024/25, reaching a record high of 55 centres. The growth reflects Umalusi’s strategic commitment to progressively expand its verification of marking centre readiness, thereby enhancing the quality assurance of marking activities.

In the schools sector, the number of centres monitored during the first and the second quarters of the 2025/26 financial year remained steady at 20 (one in Quarter 1 and 19 in Quarter 2), consistent with the figures recorded in both 2023/24 and 2024/25 for the same period.

The monitoring of the marking centres in the post-school sector decreased slightly, from 42 in 2023/24 to 41 in the 2024/25 financial year, because of the merging of two marking centres by the DHET in November 2024.

Between April and June 2025/26, Umalusi monitored 11 marking centres across the school and post-school sectors. In Quarter 2, the number of monitored centres rose to 29 and further increased to 47 in Quarter 3 to accommodate the end-of-year examinations.

Figure 6 summarises the number of marking centres monitored.

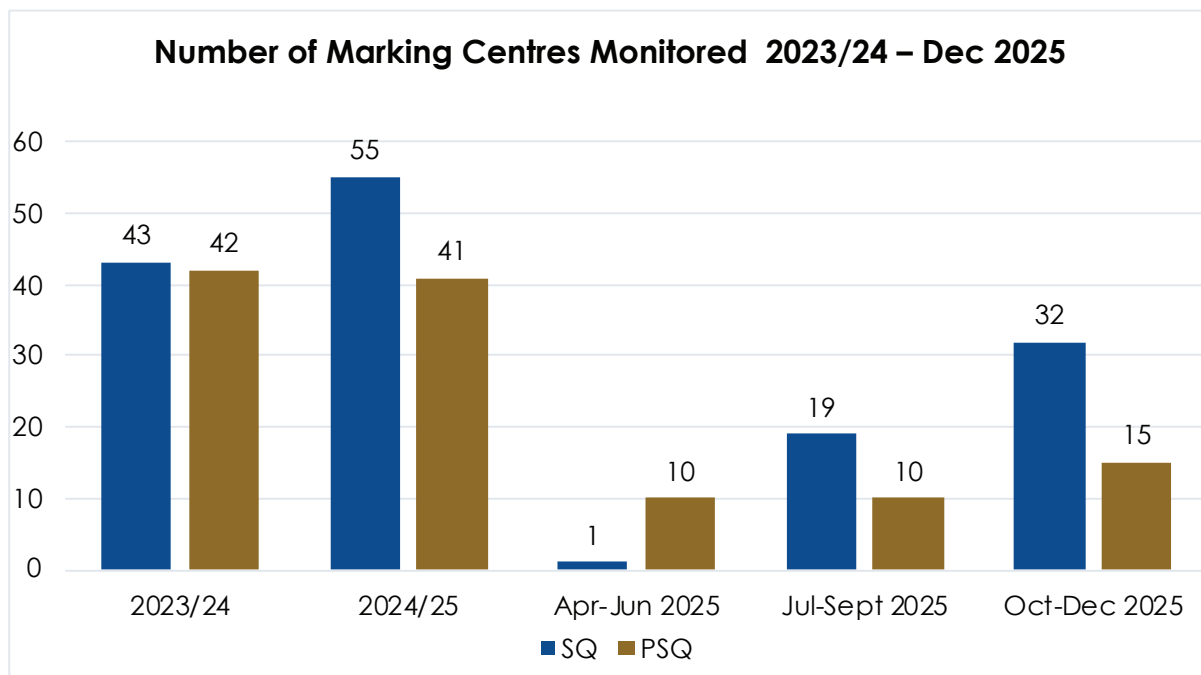


Figure 6: Number of marking centres monitored (2023/24 – Dec 2025)

2.2.9 Verification of marking

Umalusi conducts verification of marking to ensure that the assessment bodies mark the candidates' scripts according to the approved marking guidelines and that the standard of marking is consistent and fair. To this end, Umalusi conducted verification of marking for all NSC examinations undertaken by the SACAI, IEB and DBE during the Medium-Term Expenditure Framework (MTEF) period.

In the schools sector, the number of subjects for which marking was verified increased from 92 in 2023/24 to 95 in 2024/25. This gradual growth reflects Umalusi's ongoing commitment to expanding its oversight. Notably, this increase was achieved despite financial constraints resulting from budget cuts and austerity measures.

In the first quarter of the 2025/26 financial year, Umalusi verified the marking of six IEB subjects, consistent with the corresponding period of the previous year. In Quarter 2, this number increased to 27 subjects, covering the June examinations conducted by SACAI and DBE. In Quarter 3, Umalusi verified the marking of 37 DBE subjects, 15 SACAI subjects and ten IEB subjects for the November 2025 NSC examinations.

The period 2024/25 saw a decrease in the number of subjects for post-school qualifications for which the verification of marking was conducted, from 234 in 2023/24 to 187 in 2024/25. This was the result of a lack of enrolments in one learning area of the GETC: ABET and the decrease in centres that offer NATED subjects, due to the phasing out of NATED 190/191 N2-N3 programmes. Marking was verified for 21 subjects/learning areas for April–June 2025/26.

In Quarter 2, a higher number of subjects were verified for post-school qualifications, primarily due to the August NATED N3 trimester and the GETC: ABET examinations on request administered by the IEB. In Quarter 3, the number of subjects verified increased across both school and post-school qualifications, as nine end-of-year national examinations were administered by four assessment bodies during this period.

Figure 7 summarises the verification of marking conducted.

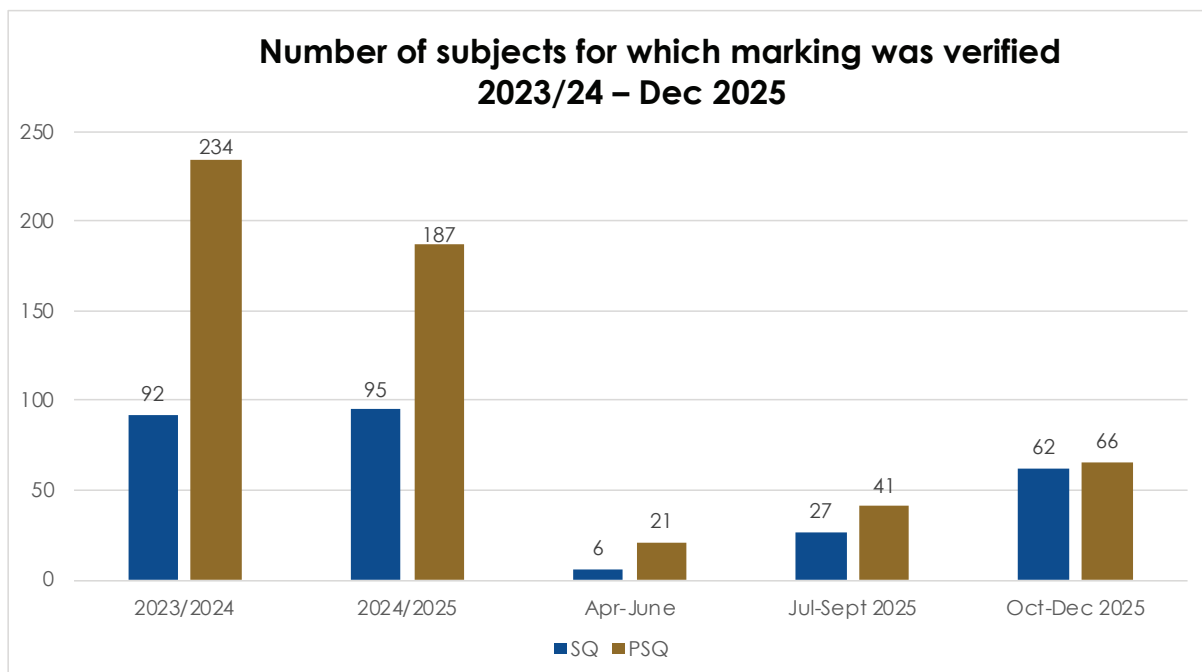


Figure 7: Number of subjects for which marking was verified (2023/24 – Dec 2025)

2.2.10 Demand for services

2.2.10.1 Online schools

Online schools currently operate in an unregulated environment because existing legislation and frameworks do not specifically address them. Some of these schools offer the NSC and ensuring the credibility of this qualification in online schools is critical. To safeguard the integrity of the NSC, non-negotiable guidelines have been shared with assessment bodies as an interim measure. Additionally, assessment bodies must apply for concessions to certify candidates from online schools, provided they are willing to take full accountability. Umalusi is currently working closely with the DBE on regulatory matters concerning online schools.

2.2.10.2 General Education Certificate (GEC)

The GEC is a qualification under development by the DBE that has been proposed for registration on Level 1 of the NQF, with 120 credits. The qualification was submitted to Umalusi for evaluation and subsequent approval and registration on the NQF. The evaluation process for the qualification was concluded and feedback was provided to the DBE in the form of directives Umalusi awaits the DBE's resubmission of the GEC qualification policy, together with the underpinning curricula, for consideration for registration on the GFETQSF of the NQF.

2.2.10.3 National Senior Certificate for Adults (NASCA)

The NASCA is a qualification registered at Level 4 on the NQF. Although this qualification is registered on the NQF it is not yet ready for implementation, due to curriculum and implementation-related challenges.

A Ministerial Task Team (MTT) has been established to oversee the reconceptualisation of the qualification and to address the challenges that have delayed its implementation. Umalusi is part of the MTT and provides regular updates to the internal structures of the organisation. The MTT has finalised a report and made recommendations to the Minister for consideration. Umalusi is awaiting the submission of the qualification from the DHET.

2.2.10.4 Statistics at a Glance

Umalusi envisages publishing an annual statistical report comprising trends and developments of GFETQSF qualifications. For the 2025/26 financial year, the report will focus on the National Accredited Technical Education Diploma (NATED) qualification. The NATED qualification has, for many years, played a pivotal role in technical and vocational education in South Africa and has now been phased out. The working title of the annual report is "Stats at a Glance".

2.2.11 Credible qualifications

2.2.11.1 Audit of qualifications on the GFETQSF

Umalusi is legislated to develop and maintain standards of qualifications within the GFETQSF. Umalusi is committed to ensuring that all its qualifications are up to date and responsive to the education and economic needs of the learners they are intended to serve. The audit of qualifications is further intended to determine whether the qualifications meet the criteria for the GFETQSF and the requirements for retention and re-registration on the NQF. To kickstart the process, the NATED N2-N3 programmes, which are being phased out, will be audited as part of a pilot of the audit instrument in the 2025/26 financial year.

2.3 STAKEHOLDER ANALYSIS

Stakeholders are an integral part of every organisation and, in Umalusi's case, important for ensuring that the quality of education in South Africa is up to the required standard. As part of ensuring quality education in South Africa, Umalusi is required by legislation to develop and manage qualifications and to maintain education standards in the GFETQSF. Therefore, the organisation works collaboratively with different stakeholders to realise its mandate. Table 3 shows broad stakeholders in Umalusi's space.

Table 3: Umalusi stakeholders

Broad category	Stakeholders
Policy makers	<ul style="list-style-type: none"> Minister of Basic Education Minister of Higher Education and Training Portfolio Committee on Basic Education Portfolio Committee on Higher Education and Training Provincial legislatures The Presidency Parliament
Policy implementers	<ul style="list-style-type: none"> South African Qualifications Authority (SAQA), Council on Higher Education (CHE), Quality Council for Trades and Occupations (QCTO) South African Council for Educators (SACE), Universities South Africa (USAf), Joint Matriculation Board (JMB) DBE, DHET Independent schools, private TVET colleges, private adult education centres Independent assessment bodies (IEB and SACAI) Public schools, school governing bodies Universities, non-governmental organisations (NGOs)
Policy beneficiaries	<ul style="list-style-type: none"> Learners, parents/guardians, media, employers, civil society, universities, etc.
Staff	<ul style="list-style-type: none"> Umalusi employees

While Umalusi has many stakeholders, some directly influence its work in the quality sector: the organisation works with quality councils such as the QCTO, CHE and SAQA to manage different qualifications found in the NQF. Hence the four bodies collaborate through research and task teams, as instituted by the Minister of Higher Education and Training and representation in the Council structures of these institutions.

Umalusi also works with public assessment bodies, the DBE and DHET and private assessment bodies, the IEB and SACAI, through quality assurance processes. The assessment bodies offer and/or assess the following qualifications in the GFETQSF:

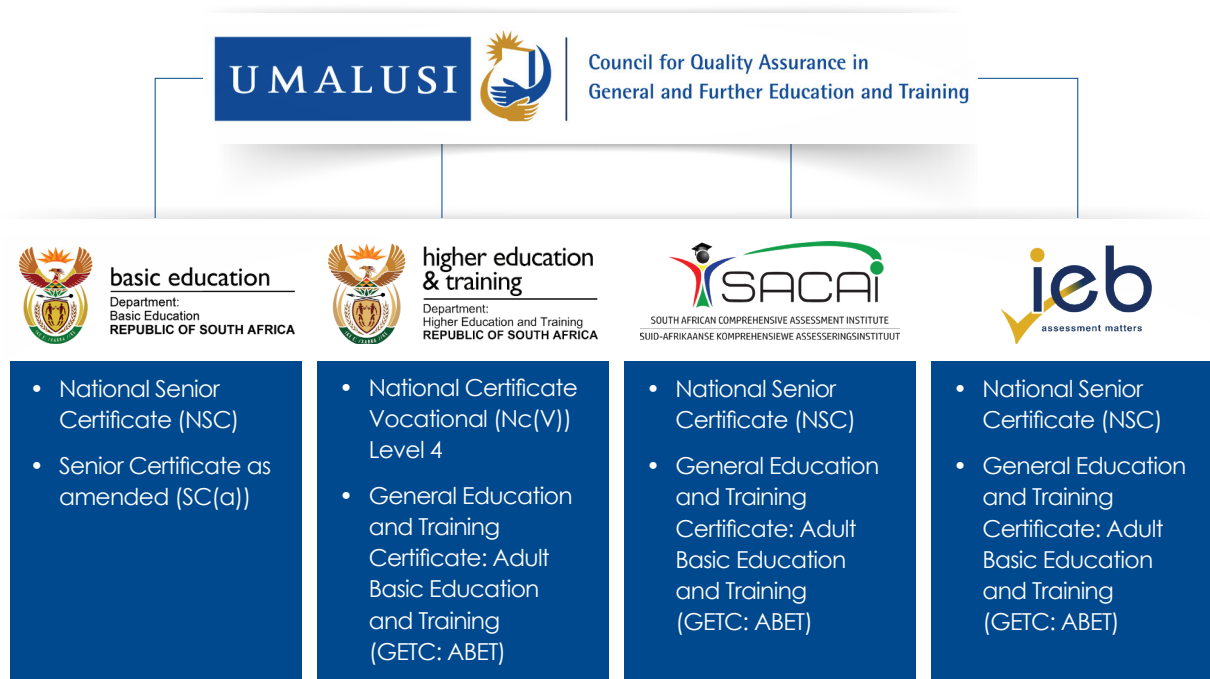


Figure 8: Public and private assessment bodies and the GFETQSF qualifications they offer and/or assess

Umalusi connects with the assessment bodies through QAA processes, evaluation of qualifications and curricula and certification of the qualifications they offer. The organisation also accredits all private assessment bodies.

Other stakeholders include private institutions that Umalusi accredits and institutions of higher learning with which Umalusi collaborates on matters of education research.

Numerous verification clients depend on Umalusi to verify qualifications, while learning communities make use of Umalusi's work and publications for their own research processes. The media is a crucial partner, providing a platform for informing the public about Umalusi's work. The public, which includes parents and learners, depends on Umalusi for information on accredited private institutions and the enhancement of quality education in the country.

2.3.1 Analysis of stakeholders and their needs

Table 4 provides a detailed overview of Umalusi's stakeholders, highlighting their specific needs, the importance of their roles and the extent of their influence. Understanding this information is essential for developing effective engagement strategies that address the interests and concerns of each stakeholder group.

Table 4: Analysing needs and expectations of stakeholders

Stakeholders	Needs / Expectations	Importance	Influence
QCTO	Research, task teams as instituted by the Minister of Higher Education and Training and representation in the Council structures of these institutions	High	High
CHE	Research, task teams as instituted by the Minister of Higher Education and Training and representation in the Council structures of these institutions	High	High
SAQA	Research, task teams as instituted by the Minister of Higher Education and Training and representation in the Council structures of these institutions	High	High
DBE	QAA processes, evaluation of qualifications and curricula and certification of the qualifications they offer	High	High
DHET	QAA processes, evaluation of qualifications and curricula and certification of the qualifications they offer Registration of private colleges applying for accreditation	High	High
IEB	QAA processes, evaluation of qualifications and curricula and certification of the qualifications they offer Accreditation	High	High
SACAI	QAA processes, evaluation of qualifications and curricula and certification of the qualifications they offer Accreditation	High	High
Private education institutions	Accreditation	High	High
Institutions of higher learning	Research and capacity building	High	High
Verification clients	Verification of certificates	High	High
Media	Provides a platform for informing the public about Umalusi's work	High	High

Stakeholders	Needs / Expectations	Importance	Influence
The public	Depends on Umalusi for the enhancement of quality education in the country and for information on accredited private education institutions and for services such as application for replacement certificates	High	High
Employees	Influence public perception and educate the public about the mandate of Umalusi	High	High
National Treasury	Compliance with SCM prescripts and accounting standards	High	High
Internal and external auditors	Compliance with applicable legislative framework	High	High
ETDP SETA	Provide training through discretionary grants	Low	Low
SITA	Provide hosting for mainframe service	High	High
Sponsors	Providers for resources to support the implementation of the Umalusi mandate	High	High

2.4 PROBLEM AND SOLUTION TREE

Umalusi used the problem and solution tree to analyse its environment, by identifying its core problems, root causes and effects, with an intention to develop suitable interventions.

Table 5 shows the problem and solution analysis.

Table 5: Problem and solution analysis

Problem tree			Solution tree		
Problem	Root cause	Effects	Solution	Intervention	Outcomes
Non-compliance with Supply Chain Management (SCM) processes	Interference with SCM processes Reluctance to change/rotate suppliers (preference for particular service providers; or due to bad service previously experienced)	Compromises Umalusi as that may raise audit queries Irregular or fruitless and wasteful expenditure	Compliance with SCM policy and processes Appoint a panel of suppliers	SCM training and/or awareness sessions for Umalusi staff	Efficient and effective administration systems

Problem tree			Solution tree		
Problem	Root cause	Effects	Solution	Intervention	Outcomes
Unclear specification for suppliers	Limited market research/ needs analysis prior to submission to SCM	Poor quality of work from suppliers Withdrawal/ cancellation of request for quotations (RFQs) Delays in appointment of service providers	Clear specifications informed by research/ needs analysis by the end user	Continue with provision of training to end users	
Biased specifications from the users	Preference for specific suppliers or brands	Discourages competition	Ensuring that the specifications comply with SCM prescripts	Continuous training on SCM prescripts and processes	
Empowerment of people living with disabilities	National Treasury database does not provide details of the entities owned by people with disabilities	Inability to empower people living with disabilities	Intensify our market analysis Engage National Treasury	Increase the weights for preferential scores	
Non-performing suppliers	Insufficient resources: Suppliers lack skilled staff, proper equipment or financial stability	Poor services rendered to Umalusi	Enforcement of the terms and conditions in the SLA	Continuous appraisal of supplier performance	
Inability to meet Employment Equity (EE) targets	The adverts are not reaching the target groups	Unable to adhere to employment equity provision	Comply with EE targets by expanding the advertising strategy	Benchmarking with other organisations Sourcing databases for unemployed people with disabilities	
Outstanding certification	Learner data that is rejected is not resubmitted to Umalusi by the relevant assessment body	Disadvantages learners from accessing education at tertiary institutions	Run completeness test to determine outstanding certificates	Umalusi to enforce adherence to certification directives by assessment bodies	Attaining certificates can promote employability and access to higher education institutions

Problem tree			Solution tree		
Problem	Root cause	Effects	Solution	Intervention	Outcomes
	<p>The combination of results across assessment bodies is not automatic</p> <p>Poor implementation of certification directives to resolve system errors</p> <p>There is misalignment between systems/data of the assessment bodies and Umalusi</p> <p>Failure by assessment bodies to analyse causes for rejected learner data</p> <p>There is a delay in the resolution of irregularities</p>	<p>Umalusi is opening itself up to litigation if learners who have met the requirements for the qualification are not certified timeously</p> <p>Unemployability – learners not finding jobs</p> <p>Reputational harm to Umalusi (Umalusi blamed for not issuing certificates)</p> <p>Growth in the market for the production of fraudulent certificates</p>		<p>Alignment of the certification systems is required</p> <p>Umalusi to conduct workshops on certification matters</p> <p>Umalusi is to revise certification directives, particularly to include:</p> <ul style="list-style-type: none"> • Automatic/ programmatic combination of subject statements into a full certificate • Combination of subject statements across assessment bodies 	<p>Improved public confidence in the system</p>
Registration and certification of candidates at unaccredited institutions	<p>No systems are in place to support the management of the registration of learners from unaccredited institutions for examinations</p>	<p>Candidates from unaccredited institutions are registered for examinations and certified by Umalusi</p>	<p>Assessment bodies must only register candidates from accredited private education institutions and apply for concessions for those who are in the accreditation process</p>	<p>Assessment bodies must develop systems that support the management of registering learners for examinations at accredited institutions and institutions in the process of accreditation</p>	<p>Zero certification of learners from institutions that do not meet the requirements for accreditation</p>

Problem tree			Solution tree		
Problem	Root cause	Effects	Solution	Intervention	Outcomes
	<p>The public lacks information about accredited private institutions</p> <p>Institutions in the accreditation process appear on the list of compliant institutions</p> <p>Information on Umalusi's website is not frequently updated. New online system cannot feed into the website to ensure timeous updating of information</p>			<p>More advocacy to encourage learners to register with accredited institutions</p> <p>Umalusi provides a list of accredited institutions and those who are in the process of accreditation for the assessment bodies to use when registering those private institutions as examination centres. For example, the list of accredited institutions for the NSC examination in the following year is finalised and submitted to the assessment bodies by October of the previous year</p>	
The misconception of qualifications in the GFETQSF	<p>Inadequate advocacy of qualifications in the GFETQSF</p> <p>Admission requirements at institutions of higher learning lean more towards the preference of NSC over NC(V)</p>	<p>Learners were unintentionally obtaining two qualifications on the same NQF level, e.g., NSC followed by NC(V) Level 4</p>	<p>Awareness of the difference between the qualifications in the GFETQSF</p>	<p>Advocacy on qualifications offered in the Umalusi sub-framework</p> <p>Engage USAf and Admissions Committee</p> <p>Intensify the working relationship between Umalusi, the DBE and the DHET on NSC and NC(V) matters</p>	<p>Public and employers will understand the NQF levels of all Umalusi qualifications for articulation and career path purposes</p>

Problem tree			Solution tree		
Problem	Root cause	Effects	Solution	Intervention	Outcomes
	<p>Some of the AET centres are misleading the public through their marketing strategies, using General Education and Training Certificate (GETC) as if it is equivalent to the NSC in terms of its NQF level</p> <p>Misunderstanding of the rules of combination by the public, for subjects from different organising fields</p>	<p>Employers are reluctant to recognise particular qualifications such as the NC(V) Level 4</p> <p>People qualified with GETC: ABET are disadvantaged in further studies by thinking that their qualification is at NQF Level 4</p> <p>Learners are not meeting certification requirements</p>		<p>Advise the DHET to provide adequate pre-admission assessment and counselling before the admission of learners in GETC: ABET classes</p> <p>Umalusi to initiate meetings with ministers</p> <p>Training of certification officials at all levels on the certification directives for qualifications on the GFETQSF</p>	
The offering of qualifications not registered on the NQF	<p>There are no consequences for institutions that offer qualifications that are not registered on the NQF</p> <p>There is a perception that foreign qualifications are better than South African qualifications</p> <p>PED are registering institutions and allowing them to offer qualifications that are not registered on the NQF</p>	<p>Institutions offering foreign qualifications bypass the accreditation process</p> <p>The South African child grows up with the belief that foreign qualifications are better than South African qualifications</p> <p>No benchmark exists for the quality of the curriculum offered</p>	Protection of the credibility of the qualifications on the NQF	<p>Give inputs to the review of the NQF Act to be specific about the consequences of offering qualifications not registered on the GFETQSF</p> <p>Increase advocacy on the NQF qualifications</p>	All qualifications offered in South Africa are registered on the NQF

Problem tree			Solution tree		
Problem	Root cause	Effects	Solution	Intervention	Outcomes
Unaccredited institutions	<p>PED not closing down unregistered and/or unaccredited schools</p> <p>Inability to meet Umalusi's accreditation requirements</p> <p>Lack of understanding of what needs to be accredited, e.g., accredited for Grades 1–7 but offering Grade 12</p> <p>Gaps in the implementation of legislation on how to deal with unaccredited IS in the country</p>	<p>Umalusi is unable to attest to the quality of the provision at the institutions</p>	<p>Closure of unaccredited institutions</p>	<p>To continue informing PED and the DHET of institutions that do not meet the requirements for accreditation</p> <p>Continuous advocacy to educate the public using various platforms, e.g., community radio stations</p> <p>Enhance Umalusi's presence on social media platforms (e.g., LinkedIn, X, Facebook and other popular applications for pop-up adverts) to make the public aware of the need to check and how to check whether an institution is accredited</p>	<p>Only private colleges and IS that meet the requirements for accreditation offer qualifications in the sub-framework</p>
Institutions offering different modalities of online education	<p>No regulatory framework for online education</p>	<p>The quality of teaching and learning may be compromised</p> <p>Parents have no recourse if the provision of the qualification is sub-standard as there is no regulatory framework guiding the quality assurance of the provision</p>	<p>All private education institutions offering qualifications in the GFETQSF through online education must be registered and accredited</p>	<p>Develop instruments for the accreditation of registered online education institutions</p> <p>Provide input to discussions on the amendment of legislation to accommodate the regulation of online education</p> <p>Sharpen advocacy on accredited institutions</p>	<p>Regulated online education</p>

3. INTERNAL ENVIRONMENT ANALYSIS

3.1 ORGANISATIONAL STRUCTURE

Umalusi is a small Schedule 3A entity with a staff of 155. The staff has increased from 151 to 155 as of December 2025. From April 2026, the establishment will increase from 155 to 164, reflecting 9 newly created positions approved by the Umalusi Council in November 2025.

The management structure of Umalusi comprises the Chief Executive Officer (CEO), three executive managers, including the Chief Financial Officer (CFO), and ten senior managers. The organisation has three branches: Administration, Qualifications and Research (Q&R) and Quality Assurance and Monitoring (QAM).

Based on work demand, Umalusi wishes to expand the staff component. The transfer of the Matriculation Board will significantly impact the approved staff establishment and additional administrative support would also be required.

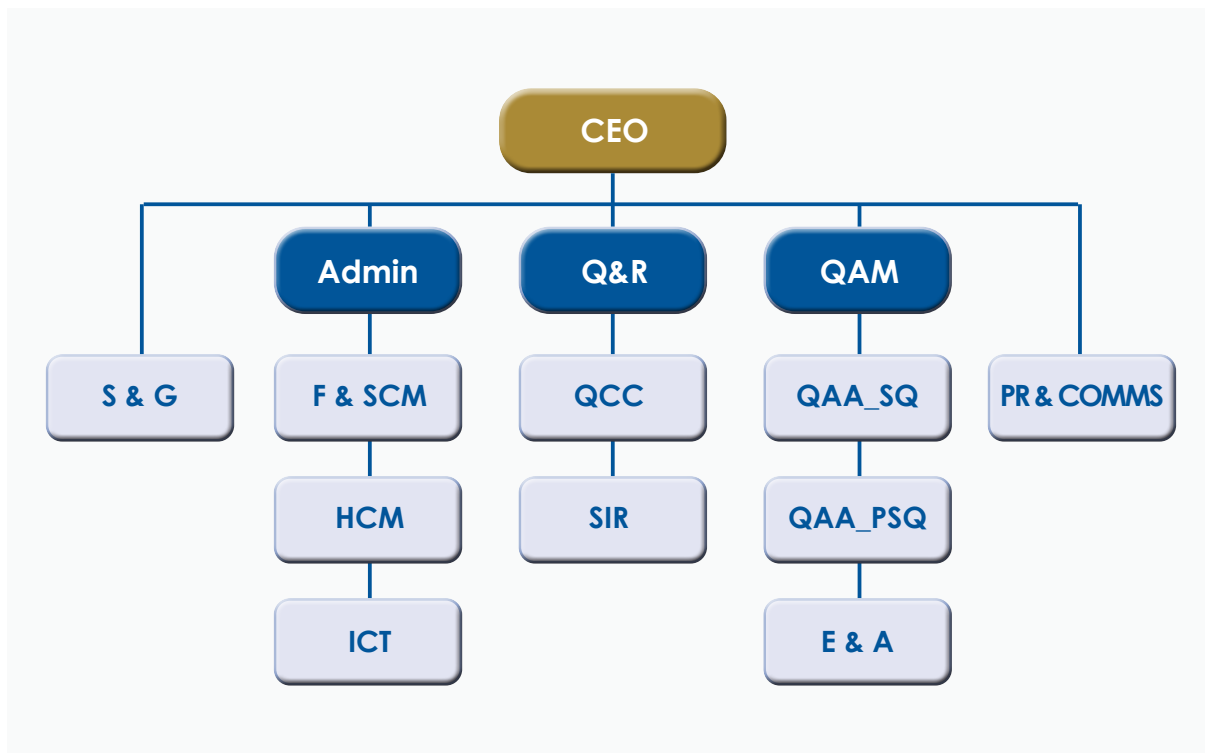


Figure 9: Current Umalusi structure

Staffing matters

The organisation operates on 155 funded positions. To alleviate the workload, a total of 9 fixed-term contractors were appointed in the 2025/26 financial year.

3.2 CAPACITY OF THE ORGANISATION TO ACHIEVE ITS MANDATE

Umalusi set a target of maintaining its vacancy rate below 10% annually. The organisation has been successful in achieving this during the previous Medium-Term Strategic Framework (MTSF) period.

3.3 FINANCIAL MANAGEMENT

Umalusi's financial resources remain the key driver of all organisational activities, but the demand outweighs the available resources. The following was budgeted and spent since the FY 2022/23:

Table 6: Organisational budget

Financial year	Original budget R'000	Actual income R'000	Actual expenditure R'000
2022/2023	187 598	197 442	183 678
2023/2024	197 428	205 986	206 824
2024/2025	208 228	216 627	243 016
*2025/2026	218 145	218 145	218 145
*2026/2027	238 494	238 494	238 494
*2027/2028	250 108	250 108	250 108
*2028/2029	261 640	261 640	261 640

* *Estimated income and expenditure*

3.4 INFORMATION AND COMMUNICATION TECHNOLOGY

The ICT Unit plays a crucial role in ensuring effective service delivery and protecting organisational information. Umalusi's main focus has been on the following key aspects:

a. Implementation of Enterprise Resource Planning (ERP)

A supply chain and financial system was implemented to streamline and automate business processes. The payroll system was migrated to the Cloud, to ensure efficient and reliable access to the service. The MIS process upgrade was completed and a new boardroom booking process was introduced as a result, to mitigate the risks and dependency on the legacy system. To improve recruitment processes, a new system was implemented.

b. Automation of core business processes

Key business processes were automated to improve business operations, namely implementing the certificate replacement system. The system is continuously being enhanced for the public. Since its initial deployment in 2022/23 it has enabled the organisation to generate revenue and improve the certificate replacement process.

Phase one of the accreditation of independent providers' system was implemented during the 2023/24 period; the system aims to fully automate the process of accrediting independent providers. Testing and development of the second phase of the system has commenced and implementation is scheduled in the 2024/25 financial year, with the last phase scheduled for the 2025/26 financial year.

During the 2023/24 and 2024/25 periods a conference system was developed and implemented to assist Umalusi with hosting the Association for Educational Assessment in Africa (AEAA) conference. The conference mobile App was also implemented to improve the accessibility of conference proceedings. Internal support systems, such as SharePoint and Signing Hub digital signatures, were implemented to improve operational efficiency. Other improvements, such as increased network speed capacity, were also implemented.

c. ICT Infrastructure projects

The implementation of the Microsoft Teams telephone system will improve collaboration and communication internally and with external stakeholders. Umalusi has also upgraded the internet line and reduced the cost, as a result of the upgrade, by 83%.

Umalusi completed the migration of IT resources to the Azure Cloud. The project was concluded on 1 April 2023. The ICT Unit ensured that the organisational information is protected by deploying internet filtering to ensure cyber-security policies are applied and complied with.

3.5 COMMUNICATION MANAGEMENT

As a public entity Umalusi has adopted the South African government's developmental approach to communication and the fundamental values of democracy, openness and public participation. Accordingly, Umalusi provides the public with timely, accurate and clear information about its services and initiatives.

To make information widely accessible to all South Africans, Umalusi uses various channels. These include its website, emails, newsletters, webinars, conferences, advocacy roadshows, press briefings, press statements, radio and television interviews, social media platforms (Facebook, X, LinkedIn and YouTube), as well as participation in community development projects.

Umalusi has established partnerships with various stakeholders, which include the private sector, academia, research institutions and NGOs, to broaden its audience reach.

3.6 CHALLENGES

Table 7: Challenges and remedial actions

Challenge	Remedial action
Human resource constraints	<ul style="list-style-type: none"> • Creation of additional positions to assist with the workload
Low staff morale and disengaged staff	<ul style="list-style-type: none"> • Recognition of employees and continuous employee cadre engagements • Conducting an employee survey
Resistance to change	<ul style="list-style-type: none"> • Implementing change management plans by involving employees early and communicating benefits of change
Late submission of procurement requests	<ul style="list-style-type: none"> • Enforcing compliance with the SCM Procedure Manual
Late submission of boardroom booking requests	<ul style="list-style-type: none"> • Enforcing adherence to the Internal Directive on Refreshments Guidelines
Late submission of invoices by suppliers	<ul style="list-style-type: none"> • Strengthening engagement and follow-up with suppliers
End-users not completing and submitting supplier performance reviews	<ul style="list-style-type: none"> • Encouraging and reminding end-users to evaluate and document supplier performance
Late submission of claims for independent contractors at the end of the financial year	<ul style="list-style-type: none"> • Engaging with relevant senior management and enforcing compliance with the Travel and Subsistence Manual
High staff turnover of ICT developers	<ul style="list-style-type: none"> • Benchmarking with other organisations to determine how ICT packages are structured • Recruiting/contracting external ICT developers
Limited availability of bid committee members for tender procurement processes	<ul style="list-style-type: none"> • The process to appoint a manager or assistant manager should be revised to seek approval from executive managers to check the availability of the appointees
Inadequate financial resources to carry out the mandate of the organisation	<ul style="list-style-type: none"> • Developing a Quality Assurance Levy as a long-term solution
Offering of alternate curricula in IS	<ul style="list-style-type: none"> • Umalusi to develop a framework to regulate schools offering alternative curricula
Some associations and PED inform schools that they do not need to be accredited if they do not offer Grade 12	<ul style="list-style-type: none"> • Advocacy through meetings with principals and officials from PED
Fraudulent documents submitted by institutions, particularly SACE registration documents	<ul style="list-style-type: none"> • Checking with SACE if a document appears to be blatantly misrepresented • Continuing to implement the MoU with SACE to ensure that all submitted SACE documents are thoroughly checked

Challenge	Remedial action
Increase in the number of errors in question papers leading to marking concessions	<ul style="list-style-type: none"> • Joint training of the assessment bodies' examining panels and Umalusi's external moderators • Targeted training • Continuing to implement consequence management • Auditing the QA units (printing precincts) of assessment bodies to ensure error-free question papers are printed
Non-reporting of unresolved examination irregularities by assessment bodies	<ul style="list-style-type: none"> • Mandating assessment bodies to provide a progress report on unresolved examination irregularities
Delays in the submission of question papers for external moderation by assessment bodies	<ul style="list-style-type: none"> • Continuing to issue letters to assessment bodies with deadlines for submission • Addressing the matter at bilateral and question paper task team meetings • Umalusi to issue a management plan clearly outlining precise dates for submission of question papers
Administration of assessment tasks that are not compliant with the CAPS/ Assessment framework	<ul style="list-style-type: none"> • Umalusi to issue directives on all cases of non-compliance
Poor quality of marking; and of internal moderation, or lack thereof	<ul style="list-style-type: none"> • Umalusi to issue directives on all cases of non-compliance
Printing errors and errors in question papers	<ul style="list-style-type: none"> • Consequence management • Auditing the quality assurance unit of the assessment bodies (DBE, SACAI, IEB) where editing of question papers takes place prior to the final print-ready disks being finalised and dispatched as print-ready consignments
Inflated SBA marks	<ul style="list-style-type: none"> • Continuing to subject candidates' SBA marks to statistical moderation to curb unreliable SBA
Automation of QAA instruments for improved information management	<ul style="list-style-type: none"> • Modernisation of processes to enhance efficacy is necessary, considering the latest developments in the IT space • The steering committee is to meet every second month • Automation of core business processes, including QAA processes • Establishing a steering committee for oversight • Setting up real-time monitoring dashboards to track progress • Creating feedback mechanisms to flag issues that frustrate development

Challenge	Remedial action
Non-compliance with internal ICT service management processes	<ul style="list-style-type: none"> ICT will implement the Service Desk Solution to cater to ICT Service Management
Inadequate systems integration to improve service delivery	<ul style="list-style-type: none"> Make provision in the budget for critical business processes
Delays in implementing research recommendations and in responding to other matters by the ministers	<ul style="list-style-type: none"> Engage the ministers to strengthen existing communication protocols to ensure efficiency
The current office configuration does not support optimal space utilisation, leading to dispersed teams	<ul style="list-style-type: none"> The renovations should consider making provision for the increasing number of Umalusi staff
Generation and approval of question paper moderation claims on the old MIS	<ul style="list-style-type: none"> Modernisation of processes to enhance efficacy is necessary, considering the latest developments in the IT space
Delayed development of the online accreditation system	<ul style="list-style-type: none"> ICT to put systems in place to ensure timeous development of the online accreditation system
Integrating historical information from the old online accreditation system into the new online accreditation system	<ul style="list-style-type: none"> ICT to put systems in place to ensure the integration of data between the new and old accreditation systems
Challenges with the online accreditation system modules	<ul style="list-style-type: none"> Currently, data is stored and updated manually until the accreditation system is fully developed and functional
Late submission of management plans by assessment bodies to plan quality assurance processes. Their plans are not communicated on time, making the work of Umalusi difficult	<ul style="list-style-type: none"> Expectations/plans must be communicated during bilateral meetings Write letters to assessment bodies Undertaking: Commitment from the assessment bodies to submit must be formalised Consequence management: Accountability sessions

4. EMPOWERMENT OF WOMEN, YOUTH AND PERSONS WITH DISABILITIES

Table 8: Plans towards the empowerment of women, youth and persons with disabilities

Pillar	Pillar requirements	Plans for 2025-30
Accountability, coordination and leadership	Bold leadership and strengthened accountability across government and society that responds strategically to Gender-Based Violence and Femicide (GBVF) with clear messaging and adequate technical and financial resources	<ul style="list-style-type: none"> • Ensure that assessments are free from content that may promote GBVF or violate human rights • Ensure that all quality assurance instruments are free from bias • Continue organising GBVF awareness sessions to educate employees. • To review current sexual harassment policy to include GBVF
Preventing and rebuilding social cohesion	Changed behaviour and social norms within key groups as a result of the rollout of evidence-based prevention interventions	<ul style="list-style-type: none"> • To review the sexual harassment policy and make staff aware of the content of the policy regularly • Continuously encourage employees to anonymously report GBVF experienced at Umalusi through the available internal platform
Economic empowerment	Shift away from toxic masculinities towards embracing positive alternative approaches for expressing masculinities and other sexual and gender identities within specific communities/ groups Accelerated initiatives that address women's unequal economic and social position through access to government and private sector procurement, employment, housing, access to land, financial resources and other income-generating initiatives	<ul style="list-style-type: none"> • Conduct HCM Policy advocacy on a continuous basis • Support for victims affected by GBVF • Ensure that the organisation operates in alignment with an updated Equity Plan • commitment on employment of people with disabilities for certain positions: <ul style="list-style-type: none"> o The organisation to have a clear strategy on how people living with disabilities will be prioritised • Continuous refinement of the specific goals aimed at the empowerment of women, youth and persons with disabilities through SCM procurement processes

Pillar	Pillar requirements	Plans for 2025-30
		<ul style="list-style-type: none"> Engagement with National Treasury regarding the upliftment of companies owned by people with disabilities Adverts shared with list provided by the Department of Women, Youth and People with Disabilities (WYPD) Support the development of a qualification for learners with Mild-To-Moderate Intellectual Disabilities (MID) Review and strengthen workplace policies on harassment, discrimination and violence, with a focus on women and LGBTQIA+ persons Set up mechanisms for anonymous reporting To provide awareness talks through HCM
Research and information management	Safe workplaces that are free of violence against women and lesbian, gay, bisexual, transgender, queer, intersex and asexual plus (LGBTQIA+) persons, including, but not limited to, sexual harassment	
Response, care, support and healing	Improved understanding of the extent and nature of GBVF broadly and in relation to specific groups and forms in South Africa Victims feel supported by the system to access the necessary psychosocial, material and other support required to assist with their healing	<ul style="list-style-type: none"> Use the services of wellness service providers

5. THEORY OF CHANGE

Table 9: Theory of Change depicting the impact of Umalusi's work

Problem statement	Inputs	Activities	Outputs	Outcomes	Impact
Lack of compliance with administrative systems	<ul style="list-style-type: none"> Human and financial resources Policies and regulations ICT infrastructure 	<ul style="list-style-type: none"> Monitoring payment register Prioritise filling of vacant positions Preparation and review of the following financial reports: Cashbook, General Ledger, Trial Balance, Bank Reconciliations, Creditors Reconciliations, Debtors Reconciliations, Journals, Asset Register, Accruals, Commitments and Contingencies Issuing of RFQs with specific goals that give preference to the historically disadvantaged groups Acquire additional funding for systems and additional human resources Maintain ICT health score at acceptable level 	<ul style="list-style-type: none"> Minimised vacancy rate Invoices paid within 30 days of receipt Interim financial statements prepared and reviewed Appointment of designated groups Interim financial statements prepared and reviewed Achieved ICT health network score 	Efficient and effective administrative systems	Relevant and credible qualifications that position candidates to access economic and higher education opportunities while preparing them to be responsible, active citizens
Outstanding certification	<ul style="list-style-type: none"> Human resources Certification datasets submitted to Umalusi 	<ul style="list-style-type: none"> Umalusi to enforce adherence to certification directives by assessment bodies Umalusi to conduct training on certification matters to officials at all levels Umalusi is to revise certification directives, particularly to include: <ul style="list-style-type: none"> Automatic/programmatic combination of subject statements into a full certificate; and Combination of subject statements across assessment bodies Processing of datasets for printing 	<ul style="list-style-type: none"> Printed certificates Submitted learner records to the NLRD 	Enhanced educational standards	
The misconception of qualifications in the GFETQSF	<ul style="list-style-type: none"> Human and financial resources Advocacy material 	<ul style="list-style-type: none"> Increase advocacy initiatives on qualifications offered in the Umalusi sub-framework and admission requirements to higher education institutions Improve the working relationship between Umalusi, the assessment bodies in relation to NSC GETC: ABET, NASCA and NC(V) matters 	<ul style="list-style-type: none"> Advocacy initiatives conducted Training of officials during bilateral meetings with the assessment bodies 		

Problem statement	Inputs	Activities	Outputs	Outcomes	Impact
		<ul style="list-style-type: none"> Advise the DHET to provide adequate pre-admission assessment and counselling before the admission of learners in GETC: ABET and NC(V) qualifications Providing more information on the articulation (RPL and CAT) of qualifications on the GFETQSF 			
Unaccredited institutions	<ul style="list-style-type: none"> Accreditation requirements Human and financial resources Private education institutions 	<ul style="list-style-type: none"> Inform PED and the DHET of institutions that did not meet the requirements for accreditation Continuous advocacy to educate the public using various platforms, e.g., community radio stations Enhance Umalusi's presence on social media platforms Self-evaluation Site visits 	<ul style="list-style-type: none"> Accreditation outcomes for private education institutions Monitored private education institutions 		
Institutions offering different modalities of online education	<ul style="list-style-type: none"> Legislation Human resources Umalusi PR & Comms strategy 	<ul style="list-style-type: none"> Develop instruments for the accreditation of registered online education institutions Provide input to discussions on development and amendment of legislation to accommodate the regulation of online education Sharpen advocacy on accredited institutions Consider reviewing the organisation's PR & Comms strategy (specify what can be verified where/what needs to be done) 	<ul style="list-style-type: none"> Accreditation outcomes for private education institutions Advocacy initiatives conducted 		
The offering of qualifications not registered on the NQF	<ul style="list-style-type: none"> Legislation Human resources Policies 	<ul style="list-style-type: none"> Develop a regulatory framework. Engagements with the providers of unregistered qualifications Conduct advocacy 	<ul style="list-style-type: none"> All qualifications offered within the GFETQSF must be registered on the NQF and regulated 		

Assumption:
Umalusi maintains and benchmarks the standards of qualifications on the sub-framework

Assumption:
All assessment bodies adhere to the standards set by Umalusi

Assumption:
Sufficient resources (budget, personnel, etc.) to do the work

Assumption:
Assessment bodies will submit the required information on time



PART C:
MEASURING
OUR
PERFORMANCE

1. INSTITUTIONAL PERFORMANCE INFORMATION

Table 10 lists Umalusi's core programmes and sub-programmes.

Table 10: Core programmes and sub-programmes

Programme	Sub-programmes
1. Administration	1.1 Strategy and Governance (S&G) 1.2 Public Relations and Communications (PR & Comms) 1.3 Information and Communication Technology (ICT) 1.4 Human Capital Management (HCM) 1.5 Finance and Supply Chain Management (F&SCM)
2. Qualifications and Research	2.1 Qualifications, Curriculum and Certification (QCC) 2.2 Statistical Information and Research (SIR)
3. Quality Assurance and Monitoring	3.1 Quality Assurance of Assessment: School Qualifications (QAA: SQ) 3.2 Quality Assurance of Assessment: Post-School Qualifications (QAA: PSQ) 3.3 Evaluation and Accreditation (E&A)

1.1 PROGRAMME 1: ADMINISTRATION

1.1.1 Programme purpose

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

1.1.2 Sub-programmes and purpose

The Administration programme comprises the following five sub-programmes:

Sub-programme 1.1: Strategy and Governance

The S&G sub-programme aims to provide good corporate governance, support Council, manage the Office of the CEO, coordinate risk management, manage performance information and facilitate strategy development.

Sub-programme 1.2: Public Relations and Communications

The PR & Comms sub-programme aims to communicate the organisational mandate, strategy and services to stakeholders.

Sub-programme 1.3: Information and Communications Technology

The purpose of the ICT sub-programme is to manage, support and maintain Umalusi's ICT resources and provide support to the business units.

Sub-programme 1.4: Human Capital Management

This sub-programme aims to effectively implement HCM governance, attract top talent, cultivate a culture of continuous learning and development, ensure a transparent performance management system, offer attractive rewards and benefits and ensure that human capital is retained in the organisation to deliver on its mandate.

Sub-programme 1.5: Finance and Supply Chain Management

To ensure transparent, accountable and sound financial management and to maintain a procurement system that is fair, equitable, transparent, competitive and cost effective.

1.1.3 Outcomes, outputs, performance indicators and targets

Table 11 shows the outcomes, outputs, performance indicators and targets for the Administration programme and its sub-programmes.

Table 11: Administration: Outcomes, outputs, indicators and targets

Outcome	Outputs	Output indicators	Annual targets						
			Audited performance			Estimated performance			
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Efficient and effective administrative systems	1.1 Advocacy initiatives conducted	1.1.1 Number of advocacy initiatives conducted	8	14	10	10	12	12	12
	1.2 Achieved ICT network health score	1.2.1 ICT network health score maintained at $\geq 97\%$	97%	98%	$\geq 97\%$	$\geq 97\%$	$\geq 97\%$	$\geq 97\%$	$\geq 97\%$
	1.3 Minimised vacancy rate	1.3.1 Vacancy rate maintained at $\leq 8\%$	8%	10%	$\leq 10\%$	$\leq 10\%$	$\leq 8\%$	$\leq 8\%$	$\leq 7\%$
	1.4 Suppliers' invoices paid within 30 days	1.4.1 Percentage of valid invoices paid within 30 days of receipt	-	-	100%	100%	100%	100%	100%
	1.5 Interim financial statements	1.5.1 Number of interim financial statements prepared quarterly	-	-	-	3	3	3	3

1.1.4 Indicators: Annual and quarterly targets

Table 12 shows the Administration programme's output indicators and annual and quarterly targets.

Table 12: Administration: Indicators, annual and quarterly targets

Output indicators	Reporting cycle	Annual targets	Quarter 1	Quarter 2	Quarter 3	Quarter 4
1.1.1 Number of advocacy initiatives conducted	Quarterly	12	3	3	3	3
1.2.1 ICT network health score maintained at $\geq 97\%$	Quarterly	$\geq 97\%$	$\geq 97\%$	$\geq 97\%$	$\geq 97\%$	$\geq 97\%$
1.3.1 Vacancy rate maintained at $\leq 8\%$	Quarterly	$\leq 8\%$	$\leq 8\%$	$\leq 8\%$	$\leq 8\%$	$\leq 8\%$
1.4.1 Percentage of valid invoices paid within 30 days of receipt	Quarterly	100%	100%	100%	100%	100%
1.5.1 Number of interim financial statements prepared quarterly	Quarterly	3	-	1	1	1

1.1.5. Explanation of planned performance over the medium-term period

The Administration programme's outputs will be implemented to ensure the achievement of the outcome: efficient and effective administrative systems. All Administration sub-programmes will play a role in achieving this outcome. Each sub-programme will focus on the activities and projects for the 2026/27 financial year, in line with the MTDP period. The following will be implemented to ensure that the outcome and impact are achieved.

a. Strategy and Governance

In addition to developing the 2026/27 APP and monitoring performance through reporting, the focus will be on the following:

- i. Managing organisational risks;
- ii. Monitoring performance information audit findings;
- iii. Improving the management of performance information; and
- iv. Strengthening corporate governance.

This sub-programme manages all performance information in the organisation. Therefore, appropriate systems, processes and controls for managing performance are crucial to achieving a clean audit for the entire five-year term.

b. Public Relations and Communications

In addition to regular PR & Comms services, the focus during this period will be on intensifying advocacy through the following:

- i. Produce a guideline document outlining how Umalusi will, where practically possible, provide services to the public in the four official languages adopted in the Umalusi Communication Policy;
- ii. Maintain the Umalusi website; and
- iii. Optimise the use of the Umalusi digital media platforms (Facebook, X, LinkedIn and YouTube) to keep stakeholders informed about the work of Umalusi.

The optimisation of the use of digital media platforms does not only maintain Umalusi brand visibility but also helps to expand the reach of Umalusi messages. All communication platforms, including digital media, enable the organisation to educate the public about the GFETQSF; this is a legislative mandate.

c. Information and Communication Technology

In addition to its routine services, the focus of ICT during this period will be on:

- i. Improving HCM and F&SCM systems and to ensure efficiency on organisational operations and governance; and
- ii. Automation of operational processes, namely Phase 2 of the accreditation of independent providers system and the QAA system.

d. Human Capital Management

In this financial year, in addition to its usual functions, the focus of HCM will be on:

- i. Seeking to retain experienced and qualified employees;
- ii. Implementing an online claim system for all contract workers.

e. Finance and Supply Chain Management

In addition to effective, efficient and transparent financial administration, the focus this financial year will be on strengthening the financial control systems to ensure accurate and complete financial reporting:

- i. Progress reports on revenue collection and expenditure management.
- ii. Allocation of the preference points to the companies owned by women, youth and people living with disabilities when appointing the suppliers.
- iii. Maintaining a work environment that is safe and secure for all employees.

The organisation continues to align its processes and policies with developments in the public sector and legislative amendments to adjust to the changing environment and to ensure effective and efficient administration. Umalusi's financial and supply chain management policies, systems and processes are reviewed and monitored on a continuous basis to always ensure compliance. The efficiency and effectiveness of financial management systems contributed to the organisation's achievement of a clean audit.

1.2 PROGRAMME 2: QUALIFICATIONS AND RESEARCH

1.2.1 Programme purpose

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

1.2.2 Sub-programmes and purpose

The Q&R programme comprises the following two sub-programmes:

Sub-programme 2.1: Qualifications, Curriculum and Certification

The purpose of the QCC sub-programme is to manage the GFETQSF qualifications and the standard QCC functions of managing qualifications, certification and verification.

Sub-programme 2.2: Statistical Information and Research

The purpose of the SIR sub-programme is to provide a platform for research, statistical support and the standardisation of learner results, to inform Council's professional work and organisational strategy.

1.2.3 Outcomes, outputs, performance indicators and targets

Table 13 shows the outputs, performance indicators and targets for the Q&R programme and its sub-programmes.

Table 13: Qualifications and Research: Outcomes, outputs, indicators and targets

Outcome	Outputs	Output indicators	Annual targets						
			Audited performance			Estimated performance		MTEF period	
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/2029
Enhanced education standards	2.1 Audit conducted on qualifications on the GFETQSF	2.1.1 Number of audits conducted on qualifications on the GFETQSF	-	-	-	1	1	1	1
	2.2 Certificates printed within 30 working days of receiving the request from the Assessment body	2.2.1 Percentage of certificates printed within 30 working days of receiving the request from the Assessment body	-	-	-	95%	95%	95%	95%
	2.3 Verification requests completed within two working days	2.3.1 Percentage of verification requests completed within two working days	-	-	-	95%	95%	95%	95%
	2.4 Research projects completed in various formats	2.4.1 Number of research projects completed in various formats	5	6	6	6	7	7	7

1.2.4 Indicators: Annual and quarterly targets

Table 14 shows the Q&R programme’s output indicators and annual and quarterly targets.

Table 14: Qualifications and Research: Indicators, annual and quarterly targets

Output indicators	Reporting cycle	Annual targets	Quarter 1	Quarter 2	Quarter 3	Quarter 4
2.1.1 Number of audits conducted on qualifications on the GFETQSF	Annual	1	-	-	-	1
2.2.1 Percentage of certificates printed within 30 working days of receiving the request from the Assessment body	Quarterly	95%	95%	95%	95%	95%
2.3.1 Percentage of verification requests completed within two working days	Quarterly	95%	95%	95%	95%	95%
2.4.1 Number of research projects completed in various formats	Annual	7	-	-	-	7

1.2.5. Explanation of planned performance over the medium-term period

a. Qualifications, Curriculum and Certification

The Programme 2 activities and programmes support the outcome: Enhanced educational standards. The two sub-programmes will enhance educational standards through the outputs set for this period.

In addition to the standard QCC functions of managing qualifications, certification and verification, the focus for the 2026/27 financial year will be on:

- i. Reviewing the GFETQSF and associated policies;
- ii. Reviewing qualifications registered on the GFETQSF;
- iii. Appraising new qualifications and curricula; and
- iv. Developing systems for e-certification and e-verification.

Policies are reviewed and developed to ensure alignment with the objectives of the NQF. Within this period, Umalusi intends to review the Policy for the GFETQSF; develop a Framework for Standards in the GFETQSF; develop a Framework for the Regulation of Foreign Qualifications; and develop Standards for a Qualification for Learners with MID.

As a quality council, Umalusi must ensure that qualifications in the GFETQSF are offered in a manner that protects the integrity and credibility of these qualifications. Where intergovernmental agreements have been concluded on offering the GFETQSF qualifications, Umalusi will determine and monitor the QAA standards to ensure that these qualifications are not compromised.

b. Statistical Information and Research

In addition to SIR functions, the focus for this year will be on:

- i. Conducting research on qualifications registered on the GFETQSF;
- ii. Creating platforms for intellectual engagement (e.g., webinars, seminars, conferences); and
- iii. Capacity-building initiatives.

Quality councils are required to undertake or commission and disseminate research on critical issues pertaining to the development and implementation of the GFETQSF. The research for this MTDP period is intended to provide robust, evidence-based insights to inform recommendations aimed at enhancing qualifications and associated curricula and quality assurance models. Additionally, the research aims to advance the understanding of online assessment methodologies in response to the increasing prevalence of online schools.

Furthermore, it seeks to support the development of requisite skills aligned with current and future educational, societal and economic demands.

The outcomes of such research also play a pivotal role in refining qualification standards and providing the Minister with informed advice to strengthen these standards. By contributing to the ongoing improvement of education quality within the GFET sector, the research establishes a foundational theoretical framework for Umalusi's professional activities. Additionally, public dissemination and engagement in research are facilitated through platforms such as conferences, seminars, webinars and colloquia, ensuring broader awareness and understanding of the sub-framework.

1.3 PROGRAMME 3: QUALITY ASSURANCE AND MONITORING

1.3.1 Programme purpose

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

1.3.2 Sub-programmes and purpose

The QAM programme comprises the following three sub-programmes:

Sub-programme 3.1: Quality Assurance of Assessment: School Qualifications

The purpose of this sub-programme is to ensure the credibility of the assessment and examination results of school qualifications registered on the GFETQSF.

Sub-programme 3.2: Quality Assurance of Assessment: Post-School Qualifications

The purpose of this sub-programme is to ensure the credibility of the assessment and examination results of post-school qualifications registered on the GFETQSF.

Sub-programme 3.3: Evaluation and Accreditation

The purpose of this sub-programme is to quality assure the delivery of qualifications registered on the GFETQSF at private education institutions; and the capacity of private assessment bodies to assess those qualifications.

1.3.3 Outcomes, outputs, performance indicators and targets

Table 15 shows the outcomes, outputs, performance indicators and targets for the QAM programme and its sub-programmes.

Table 15: Quality Assurance and Monitoring: Outcomes, outputs, performance indicators and targets

Outcome	Outputs	Output indicators	Annual targets						
			Audited performance			Estimated performance			
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Enhanced educational standards	3.1 Published quality assurance of assessment reports	3.1.1 Number of quality assurance of assessment reports published for qualifications registered on the GFETQSF	9	9	9	9	7	7	7
	3.2 Approved question papers	3.2.1 Percentage of received question papers approved per qualification	100% (1 014/1 014)	100% (1 079/1 079)	100%	100%	100%	100%	100%
	3.3 Audited assessment bodies for their state of readiness	3.3.1 Number of assessment bodies audited for their state of readiness to conduct examinations	4	4	4	4	4	4	4

Outcome	Outputs	Output indicators	Annual targets						
			Audited performance			Estimated performance			
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
3.4 Verified marking	3.4.1 Number of subjects for which verification of marking is conducted	92	92	95	95	95	95	95	
3.5 Moderated internal assessment	3.5.1 Number of subjects for which moderation of internal assessment is conducted	190	195	200	200	170	170	170	
3.6 Accreditation outcomes for private education institutions	3.6.1 Percentage of accreditation outcomes for private education institutions finalised within a financial year	99.26% (270/272)	98.16% (213/217)	92%	93%	94%	95%	95%	
3.7 Monitored private education institutions	3.7.1 Percentage of identified accredited private education institutions monitored after being granted accreditation	94.67% (142/150)	97.09% (200/206)	91%	92%	93%	94%	95%	

1.3.4 Indicators: Annual and quarterly targets

Table 16 shows the QAM programme's output indicators and annual and quarterly targets.

Table 16: Quality Assurance and Monitoring: Indicators, annual and quarterly targets

Output indicators	Reporting cycle	Annual targets	Quarter 1	Quarter 2	Quarter 3	Quarter 4
3.1.1 Number of quality assurance of assessment reports published for qualifications registered on the GFETQSF	Annual	7	-	-	-	7
3.2.1 Percentage of received question papers approved per qualification	Annual	100%	-	-	-	100%
3.3.1 Number of assessment bodies audited for their state of readiness to conduct examinations	Annual	4	-	-	-	4
3.4.1 Number of subjects for which verification of marking is conducted	Annual	95	-	-	-	95
3.5.1 Number of subjects for which moderation of internal assessment is conducted	Annual	170	-	-	-	170
3.6.1 Percentage of accreditation outcomes for private education institutions finalised within a financial year	Annual	94%	-	-	-	94%
3.7.1 Percentage of identified accredited private education institutions monitored after being granted accreditation	Annual	93%	-	-	-	93%

1.3.5. Explanation of planned performance over the medium-term period

a. Quality Assurance of Assessment: School Qualifications

In addition to the standard QAA functions for school qualifications, the focus will be on:

- i. Leverage digital platforms/tools to enhance the moderation process of question papers; and
- ii. Intensifying feedback on the conduct of NSC examinations to the assessment bodies.

These two focus areas will improve the collection of data when compiling the QAA reports. Once these focus areas have been achieved, they will contribute to the enhancement of educational standards.

b. Quality Assurance of Assessment: Post-School Qualifications

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

- i. Monitoring the implementation of directives for improvement and compliance to ensure and track progress over time;
- ii. Enhancing moderators' competencies through blended training approaches to support continuous professional development and minimise errors in question papers;
- iii. Monitoring and moderation of internal assessments and integrated summative assessment tasks to ensure task implementation, the fairness, reliability and the validity of assessment outcomes; and
- iv. Ensuring accurate and fair marking through the standardisation of marking guidelines and verification of marking processes.

These focus areas will enhance the feedback from the monitoring and moderation provided to assessment bodies and improve the QAA and, consequently, student performance.

c. Evaluation and Accreditation

The purpose of this sub-programme is to quality assure the delivery of qualifications on the GFETQSF at private education institutions and the capacity of private assessment bodies to assess these qualifications. In addition to the standard evaluation and accreditation functions, the focus will be on:

- i. Advocating the requirements for the accreditation of registered independent online schools;
- ii. Finalising an approach to the accreditation of IS offering Grade R; and
- iii. Conducting monitoring site visits to some identified accredited private education institutions.

These focus areas will enhance the quality assurance of the offering of qualifications on the GFETQSF at private education institutions.

The credibility of Umalusi's qualifications depends on several quality assurance processes, all of which are intended to enhance the integrity of the GFET system in the country.

1.4 PROGRAMME RESOURCE CONSIDERATIONS

1.4.1 Overview: Budget and MTEF estimates

1.4.1.1 Organisational budget

Table 17 provides an overview of the organisation's 2026/27 MTEF estimates.

Table 17: 2026/27 MTEF estimates

	Actual audited			Approved budget	Budget estimates		
	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Rand thousand	R' 000	R' 000	R' 000	R' 000	R' 000	R' 000	R' 000
Administration	76 853	96 975	111 593	100 792	107 471	112 553	117 867
Qualifications and Research	34 692	28 656	39 736	31 000	37 996	39 822	41 641
Quality Assurance and Monitoring	77 234	79 209	91 686	86 353	93 027	97 733	102 132
Total expenditure	188 779	204 840	243 015	218 145	238 494	250 108	261 640

1.4.1.2 Programme 1: Administration

Table 18 provides an overview of budget estimates for the Administration programme.

Table 18: 2026/27 MTEF budget estimates for Programme 1: Administration

	Actual audited			Approved budget	Budget estimates		
	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Rand thousand	R' 000	R' 000	R' 000	R' 000	R' 000	R' 000	R' 000
Compensation of employees	38 544	42 947	49 000	44 707	56 165	58 698	61 425
Goods and services	36 526	44 540	52 024	44 085	43 806	46 055	48 442
Depreciation	1 783	10 048	10 569	12 000	7 500	7 800	8 000
Total expenditure	76 853	96 975	111 593	100 792	107 471	112 553	117 867

1.4.1.3 Programme 2: Qualifications and Research

Table 19 provides an overview of budget estimates for the Q&R programme.

Table 19: 2026/27 MTEF budget estimates for Programme 2: Qualifications and Research

	Actual audited			Approved budget	Budget estimates		
	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Rand thousand	R' 000	R' 000	R' 000	R' 000	R' 000	R' 000	R' 000
Compensation of employees	19 815	19 476	23 600	21 198	26 787	27 995	29 296
Goods and services	14 877	9 180	16 136	9 802	11 209	11 827	12 345
Total expenditure	34 692	28 656	39 736	31 000	37 996	39 822	41 641

1.4.1.4 Programme 3: Quality Assurance and Monitoring

Table 20 provides an overview of budget estimates for the QAM programme.

Table 20: 2026/27 MTEF budget estimates for Programme 3: Quality Assurance and Monitoring

	Actual audited			Approved budget	Budget estimates		
	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Rand thousand	R' 000	R' 000	R' 000	R' 000	R' 000	R' 000	R' 000
Compensation of employees	28 697	30 469	35 500	32,689	42 326	44 235	46 291
Goods and services	48 537	48 740	56 186	53,664	50 701	53 498	55 841
Total expenditure	77 234	79 209	91 686	86,353	93 027	97 733	102 132

1.5 EXPLANATION OF RESOURCES' CONTRIBUTION TO ACHIEVING THE OUTPUTS

The budget for the 2026/27 financial year is R238-million, representing a 9% increase from the previous financial year (R218-million: 2025/26). The transfer from DBE (R182-million) accounts for 76.5% of the 2026/27 budget. The own revenue is expected to amount to R56-million in the 2026/27 financial year. The verification fees are expected to contribute a significant portion of the own revenue, amounting to R26.8-million (47.6% of own revenue). The second major contributor to the own revenue is certification fees, which are expected to generate R10-million in the 2026/27 financial year. Interest income is expected to remain relatively unchanged compared with the previous financial year.

A significant portion of the total budget for the 2026/27 financial year is allocated to Programme 1 (Administration). The allocation to Programme 1 is R107-million, representing 45% of the total budget. Programme 1 assists and supports the organisation to discharge its core functions to achieve its mandate. The allocation covers administrative activities, which include, among others, audit services; advocacy campaigns; maintenance of Umalusi properties; governance functions; ICT infrastructure and network solutions; training and development; and staff health and wellness. The compensation budget for Programme 1 amounts to R56- million.

Programme 2 (Qualifications and Research) has been allocated R38-million, which is 16% of the budget for the 2026/27 financial year. Programme 2 is responsible for, among others, conducting research; verification of qualifications; and issuing certificates to qualifying learners. The compensation budget for Programme 2 amounts to R27-million.

Programme 3 (Quality Assurance and Monitoring) has been allocated R93-million for the 2026/27 financial year, which is 39% of the total budget. This allocation is earmarked for, among others, the moderation of question papers; verification of marking; training of moderators; discussion of marking guidelines; monitoring examinations; following up suspected irregularities; and the costs associated with Assessment Standards Committee activities. The compensation budget for Programme 3 amounts to R42-million.

1.5.1 Materiality and significance

a. Materiality

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

- i. The nature of Umalusi's business;
- ii. Statutory requirements affecting Umalusi;
- iii. Inherent and controlled risks associated with Umalusi and
- iv. Quantitative and qualitative issues.

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

- i. Any amount in respect of criminal conduct;
- ii. A minimum of R30 000 for irregular, fruitless and wasteful expenditure involving gross negligence; and
- iii. A minimum of R2.3-million (1% of total revenue) to report in terms of sub-section 55(1)(d) regarding the fair presentation of the affairs of Umalusi, its business, its financial results, its performance against predetermined objectives, its financial position and disclosure notes at the end of the financial year concerned.

b. Significance

The Council resolved that any transaction covered by section 54(2) of the PFMA will be reported on:

- i. Establishment or participation in the establishment of a company – each transaction reported separately;
- ii. Participation in a significant partnership, trust, unincorporated joint venture or similar arrangement – 50% of voting rights;
- iii. Acquisition or disposal of a significant shareholding in a company – 30% or more of shareholding;
- iv. Acquisition or disposal of a significant asset – 1% of fixed assets;
- v. Commencement or cessation of significant business activity – each transaction separately; and
- vi. A significant change in the nature or extent of its interest in a significant partnership, trust, unincorporated joint venture or similar.

2. KEY RISKS TO THE STRATEGIC PLAN AND THEIR MITIGATION

Table 21: Updated key risks and mitigation strategies

Outcome	Key risk (s)	Risk mitigation
Efficient and effective administrative systems	Staff retention	<ul style="list-style-type: none"> • Detailed analysis of the exit interviews • Strategies in place for training and development • The organisation offers financial study assistance • The organisation has a performance management system in place to reward high performing employees • Policy on working overtime in place • Employees are afforded opportunities to act in higher positions
	Litigation	<ul style="list-style-type: none"> • Strengthen compliance and governance • Transparent and fair accreditation process • Strengthening stakeholder engagement • Maintaining human resource and labour relations • Proactive risk management and legal preparedness (use of legal firms to respond)
Enhanced educational standards	Errors in question papers	<ul style="list-style-type: none"> • Focused training of moderators • Proofreading • Backup question papers • Issue and follow up on question paper management plans with assessment bodies • External moderators commit to upholding the quality and integrity of question papers • Audit the printing precinct prior to bulk printing in problematic subjects

Outcome	Key risk (s)	Risk mitigation
	Incorrect reporting on the accreditation of institutions	<ul style="list-style-type: none"> • All service requests are logged • Update the accreditation outcome spreadsheet after each ACC meeting • Records of accreditation processes conducted are kept on operational target spreadsheets
	Issue certificates wrongfully or withhold certificates from learners (reputational harm)	<ul style="list-style-type: none"> • Engage assessment bodies to improve their certification processes and adhere to certification directives and policies • Quality assurance of results strengthened • Conduct completeness tests to identify records of candidates not yet certified to inform assessment bodies to process the applications and correct the errors that caused the rejections • Monitor the irregularities reported by the assessment bodies to prompt assessment bodies to complete and finalise the irregularity cases not finalised • Declarations of information accuracy submitted with datasets by the assessment bodies • Regular certification task team meeting to address certifying matters
	Datasets are approved under extremely tight timeframes	<ul style="list-style-type: none"> • Consultation meetings with assessment bodies to discuss management plans • Constant consultations to take place with assessment bodies to identify problems and develop contingency plans • A new test function has been included to reject datasets with invalid records at the beginning of the mop-up process to ensure a quicker turnaround time • Continuous verification of assessment bodies' relevant computer systems

3. PUBLIC ENTITIES


None.

4. INFRASTRUCTURE PROJECTS

None.

5. PUBLIC-PRIVATE PARTNERSHIPS

None.



PART D:
**TECHNICAL
INDICATOR
DESCRIPTIONS
(TIDs)**

Indicator title	1.1.1: Number of advocacy initiatives conducted
Definition	This indicator measures the number of initiatives (seminars, webinars, workshops, exhibitions, advocacy visits, etc.) that Umalusi used to interact with stakeholders and to communicate information about the GFETQSF. The initiatives are intended to communicate key messages to stakeholders about issues related to the organisation's legislative mandate. The initiatives will also be used to update stakeholders on new developments in the NQF Levels 1–4. They also provide an opportunity for the CEO to interact with key stakeholders on the strategic direction taken by the organisation.
Source of data	Organisational programmes, information documents, standard operating procedures/guidelines, policies and service level agreements (SLAs); operational units.
Method of calculation	Simple count
Means of verification	Invitations sent to or received from stakeholders, programmes and presentations or information shared during the initiative.
Assumptions	The information shared with stakeholders during advocacy initiatives is related to the organisation's legislative mandate.
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Cumulative (year-end)
Reporting cycle	Quarterly
Desired performance	Constant interaction with stakeholders to discuss the organisation's core mandate.
Indicator responsibility	Senior Manager: PR & Comms

Indicator title	1.2.1: ICT network health score maintained at ≥97%
Definition	<p>The ICT network health score is a weighted average calculation that provides an “at a glance” overall network health score. Individual items are scored 0% (lowest) to 100% (highest). Server uptime, alarm score, disk score and operating system scores are totalled, averaged and weighted to generate a percentage.</p> <p>Server uptime measures the percentage of time that servers are running; the higher the score, the better the performance. Alarm scores are measured by the number of system-generated alarms: the fewer alarms generated, the higher the score (100% means zero to three alarms). Disk score indicates the percentage of hard drive space used on all machines or servers to ensure that the space used is less than 60%. The operating system (OS) score indicates that all mission-critical machines or servers have the latest version of Windows installed.</p>
Source of data	IT management software and monitoring solution
Method of calculation	<p>Quarterly calculation:</p> <p>The average percentages for server uptime, alarm score, disk score and operating systems are calculated as individual percentages, added together and divided by four: i.e., server uptime score + alarm score + disk score + operating system score/4.</p> <p>Annual calculation:</p> <p>Four reported quarterly network health percentages are added together at the end of the financial year and the total is divided by four to give the average annual network health score.</p>
Means of verification	System-generated ICT network health score report.
Assumptions	None
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	To maintain the ICT health network score at an acceptable level for smooth ICT operations and security of information.
Indicator responsibility	Senior Manager: ICT

Indicator title	1.3.1: Vacancy rate maintained at ≤8%
Definition	This indicator measures minimising the organisational vacancy rate to an acceptable rate to ensure that mandates are carried out efficiently and effectively.
Source of data	Staff establishment records or system
Method of calculation	<p>Quarterly calculation:</p> <p>Numerator: number of vacant positions on the organisational structure</p> <p>Denominator: number of all-approved (funded) positions on organisational structure</p> <p>Multiply by 100</p> <p>Annual calculation:</p> <p>Fourth quarter output</p>
Means of verification	Quarterly reports on the staff establishment
Assumptions	Vacated positions are filled within three months
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	Maintain organisational vacancy rate at 8% or lower annually.
Indicator responsibility	Senior Manager: HCM

Indicator title	1.4.1: Percentage of valid invoices paid within 30 days of receipt
Definition	<p>This indicator measures the number of valid invoices paid within 30 days of receipt by the F&SCM Unit. Valid invoices are invoices submitted by suppliers who render services or supply goods to Umalusi and have been certified or verified by the Senior Manager/ delegated official of the unit that made a request for such goods or services. Valid invoices exclude invoices with queries* and all subsistence and travel-related claims covered by the Travel Policy. The 30 days will be calculated from the date of receipt of a valid invoice by the F&SCM Unit (date stamp). Any invoice with a query must be resolved before payment is made. Such invoices will be excluded from the population of the total invoices received by the F&SCM Unit. Once the query has been resolved, the 30-day period will be applied from the date on which confirmation is received by the F&SCM Unit.</p> <p>*Queries may relate to, among others, incorrect billing as per the purchase order or SLA, quantity or quality of the goods delivered or services rendered, including any dispute arising from the invoices. Such queries are communicated to the service provider.</p>
Source of data	Payment register and bank statement
Method of calculation	<p>Numerator: number of valid invoices paid within 30 days upon receipt by F&SCM</p> <p>Denominator: total number of valid invoices received</p> <p>Multiply by 100</p>
Means of verification	Invoices and bank statements
Assumptions	All invoices received by F&SCM Unit are valid for payment
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Quarterly
Desired performance	All valid invoices paid within 30 days upon receipt from suppliers
Indicator responsibility	Senior Manager: F&SCM

Indicator title	1.5.1: Number of interim financial statements prepared quarterly
Definition	<p>The indicator entails the preparation of interim financial statements on a quarterly basis (statement of financial position, statement of financial performance, statement of changes in net assets, cash flow statement and statement of comparison of budget to actual amounts, including accounting policies and relevant disclosure notes), in accordance with Generally Recognised Accounting Practice (GRAP) statements and requirements of the PFMA.</p> <p>The interim financial statements will be prepared within 30 days after the end of each quarter.</p> <p>Q1 – No target (During this period it is the finalisation of the AFS for the previous FY)</p> <p>Q2 – Q1 interim financial statements reviewed by the internal auditors (IA)</p> <p>Q3 – Q2 interim financial statements reviewed by IA</p> <p>Q4 – Q3 interim financial statements reviewed by IA</p>
Source of data	It includes, among others, a budget; revenue and expenditure reports; leave reports; asset register; monthly bank reconciliations; accounts receivable; accounts payable; cash book; general ledger; and trial balance.
Method of calculation	Simple count
Means of verification	Quarterly interim financial statements
Assumptions	Submission of accurate and complete information by all units (to be used for compiling interim financial statements); competent personnel and proper functioning of accounting systems.
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Cumulative (year-end)
Reporting cycle	Quarterly
Desired performance	Accurate and complete interim financial statements.
Indicator responsibility	Senior Manager: F&SCM

Indicator title	2.1.1: Number of audits conducted on qualifications on the GFETQSF
Definition	This indicator measures the number of audits conducted on qualifications for the GFETQSF to determine their uptake and currency, as well as their compliance with ministerial directives. This is to ensure that the qualifications are up to date and responsive to the education and economic needs of the learners they are intended to serve. The audit of qualifications is further intended to determine whether the qualifications meet the criteria for the GFETQSF and the requirements for retention and re-registration on the NQF.
Source of data	The annual audit report on the management of GFETQSF qualifications that provides the updates and status of each qualification.
Method of calculation	Simple count
Means of verification	Audit report on the management of qualifications in the GFETQSF
Assumptions	The audit instrument is available
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	Audit report reflecting qualifications for the GFETQSF that have uptake and meet the criteria for re-registration on the NQF.
Indicator responsibility	Senior Manager: QCC

Indicator title	2.2.1: Percentage of certificates printed* within 30 working days of receiving the request from the Assessment body
Definition	<p>Percentage of certificates printed for learners who complied with the requirements for a qualification within 30 days after receiving the request.</p> <p>Assessment bodies must submit records for certification according to the directives for certification.</p> <p>*Certificates can be either for a qualification or a subject statement (do not qualify for a qualification).</p> <p>*Printed means the request has been submitted to SITA to print the certificates.</p> <p>*This indicator measures the percentage of certificates printed within 30 days, out of the total number of certificates printed.</p>
Source of data	Mainframe system
Method of Calculation/ Assessment	<p>Number of certificates printed within 30 days divided by the total number of certificates printed multiplied by 100.</p> <p>Numerator – number of certificates printed within 30 days of receipt of the request for certification by the Assessment body.</p> <p>Denominator – total number of certificates printed.</p> <p>The Excel NETWORKDAYS function calculates the number of working days between the date certificates were printed and the date the request was received.</p>
Means of Verification	System-generated reports that are extracted from the mainframe and processed in Excel spreadsheets.
Assumptions	The data stored on the mainframe system is reliable, valid and timely.
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Desired Performance	To print 100% of the certificates within 30 days of receiving the request from an Assessment body for learners who complied with the requirements for a qualification.
Indicator Responsibility	Senior Manager: QCC

Indicator title	2.3.1: Percentage of verification requests completed within two working days
Definition	<p>Umalusi provides a service to contracted clients who submit requests for the verification of certificates that have been issued by Umalusi and by its predecessor, SAFCERT, since 1992.</p> <p>Clients email requests in one of three categories (manual, electronic and full verifications). An email might comprise one or more requests (qualification/certificate) for verification. Umalusi verifies and confirms the authenticity of the qualifications submitted for verification. The indicator refers to the percentage of verification requests for qualifications completed within two working days (emails responded to within two working days).</p>
Source of data	Emails on the email server
Method of Calculation/ Assessment	<p>Numerator: number of verification requests (emails) completed within the SLA (two working days)</p> <p>Denominator: total number of verification requests (emails) received</p> <p>Multiply by 100</p> <p>The Excel NETWORKDAYS function is used to calculate the number of working days (hours) between the date the email was received and the date the reply was sent. NETWORKDAYS automatically excludes weekends (Saturday and Sunday and public holidays).</p>
Means of Verification	An Excel report from the email server indicating number of requests (emails) received for verification of qualifications and verifications completed (replies on emails) within two working days.
Assumptions	The emails stored on the email server are reliable and retrievable.
Calculation Type	Non-cumulative
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Reporting Cycle	Quarterly
Desired Performance	To have 95% of the verification requests processed within a turnaround time of two working days.
Indicator Responsibility	Senior Manager: QCC

Indicator title	2.4.1: Number of research projects completed in various formats
Definition	This indicator shows the number of research projects, in various formats, on research conducted in various areas of Umalusi's mandate during a specified financial year. The purpose of the research reports is to keep the organisation updated on developments in the sector and to advise the Ministers of Education.
Source of data	Research reports
Method of calculation	Count of completed projects in various formats
Means of verification	Research reports
Assumptions	Research findings and recommendations influence the work of operational units.
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Type of indicator	Output
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	Completion of research projects and recommendations to the body concerned.
Indicator responsibility	Senior Manager: SIR

Indicator title	3.1.1: Number of quality assurance of assessment reports published for qualifications registered on the GFETQSF
Definition	<p>The indicator aims to measure the number of QAA reports published on the compliance of assessment bodies with Umalusi's policies across all quality assurance processes. Quality assurance processes include the moderation of question papers, auditing the state of readiness to manage, administer and conduct the examination, the moderation of internal assessment, the audit of appointed markers, monitoring the writing of examinations and marking and the quality assurance of marking.</p> <p>Qualification refers to a national qualification registered in the GFETQSF.</p>
Source of data	Quality assurance reports
Method of calculation	Count of QAA reports published
Means of verification	<p>QAA reports</p> <p>Communique to assessment bodies</p> <p>List of examinations conducted</p>
Assumptions	<p>The examinations will be conducted as planned for the year.</p> <p>The submission of self-evaluation reports by the assessment bodies and the monitoring and moderation reports by independent contractors.</p>
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	Approved QAA reports to provide feedback to assessment bodies on the quality assurance processes so that they may improve their functions.
Indicator responsibility	<p>Senior Manager: QAA: SQ</p> <p>Senior Manager: QAA: PSQ</p>

Indicator title	3.2.1: Percentage of received question papers approved per qualification
Definition	<p>The indicator measures the percentage of question papers submitted to Umalusi by assessment bodies for external moderation and approval.</p> <p>Assessment bodies are departments of education or bodies accredited by Umalusi, to conduct, administer and manage external summative assessment and to moderate internal assessment for qualifications registered in the GFETQSF.</p> <p>Approved or conditionally approved (not to be resubmitted) means final acceptance by the external moderator of the quality and standard of the question paper and is indicated in the report by the signature of the external moderator.</p>
Source of data	External moderator reports on moderation of question papers.
Method of calculation	<p>Numerator: the number of question papers approved</p> <p>Denominator: the number of question papers received for quality assurance</p> <p>Multiply by 100</p> <p>NB. When reporting on milestones, counting will be limited to the number of question papers received by Umalusi from assessment bodies during the quarter under review, irrespective of the date of completion and signing off of the report by the external moderator. Therefore, if the assessment body submits reports that were done and approved in Quarter 1 (April to June) after the end of Quarter 1 (e.g., in July), these reports will be used in the second quarter milestone reporting. The date of receipt of the report by Umalusi is the one that matters for purposes of reporting. At the end of the financial year, all submitted reports will be used as the denominator in the calculation.</p>
Means of verification	<p>Reports on the moderation of question papers/declaration reports.</p> <p>List of approved question papers.</p>
Assumptions	The assessment bodies will make the required changes in good time/immediately.
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	Umalusi will externally moderate and approve 100% of question papers received from assessment bodies.
Indicator responsibility	<p>Senior Manager: QAA: SQ</p> <p>Senior Manager: QAA: PSQ</p>

Indicator title	3.3.1: Number of assessment bodies audited for their state of readiness to conduct examinations
Definition	<p>In this indicator the number of assessment bodies refers to entities accredited by Umalusi to conduct external summative assessments and moderate internal assessments for qualifications registered in the GFETQSF.</p> <p>Auditing of the state of readiness refers to an evaluation of assessment bodies' processes so that Umalusi can make a pronouncement on their readiness to conduct, administer and manage external examinations for qualifications registered in the GFETQSF.</p>
Source of data	State of readiness reports
Method of calculation	Count of audited assessment bodies
Means of verification	<p>Consolidated state of readiness reports.</p> <p>List of audited assessment bodies.</p>
Assumptions	The number of assessment bodies remains constant during the financial year.
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	To audit all assessment bodies to establish their state of readiness to conduct examinations.
Indicator responsibility	Senior Manager: QAA: SQ

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

Indicator title	3.5.1: Number of subjects for which moderation of internal assessment is conducted
Definition	<p>The number of subjects refers to subjects/learning areas, in the TVET and AET sectors, which are sampled for the moderation of internal assessments. Moderation measures the assessment bodies' compliance with internal assessment requirements.</p> <p>Internal assessment refers to assessments conducted at the sites of teaching and learning and includes Site-Based Assessment (SBA) for the GETC: ABET and ICASS and PAT for TVET qualifications.</p> <p>SBA, ICASS and PAT are students' evidence of assessments conducted and assessed at the sites of teaching and learning.</p> <p>Assessment bodies are departments of education or bodies accredited by Umalusi to conduct, administer and manage examinations; and internal assessment for qualifications registered in the GFETQSF.</p>
Source of data	External moderator reports on the moderation of internal assessments.
Method of calculation	Count of subjects moderated
Means of verification	List of subjects moderated for internal assessments.
Assumptions	Timely submission of moderation of internal assessment reports by independent contractors.
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	Evidence of student work in internal assessments to be moderated and reported.
Indicator responsibility	Senior Manager: QAA: PSQ

Indicator title	3.6.1: Percentage of accreditation outcomes for private education institutions finalised within a financial year
Definition	<p>This indicator measures the percentage of accreditation reports presented to the Accreditation Committee of Council (ACC) and the outcomes, signed by the CEO of Umalusi, or, in the case of a window period granted to improve, signed by the Senior Manager: Evaluation and Accreditation, within the financial year. The accreditation reports that were presented to the ACC and deferred will also be counted as presented.</p> <p>An accreditation outcome refers to the recommendation of the ACC on the outcome of an application for accreditation from a private education institution. The outcome is presented to the CEO of Umalusi for a decision of “accreditation” for schools or “seven years’ accreditation” for private colleges, “two years’ provisional accreditation” or “no accreditation”, or the recommendation of a window period granted to the private education institution by the ACC and confirmed by the Senior Manager: Evaluation and Accreditation.</p> <p>“Private education institution” refers to independent schools, private Further Education and Training (FET) colleges, and private Adult Education and Training (AET) colleges that offer qualifications on the GFETQSF.</p> <p>“Finalised” means that the CEO or Senior Manager has signed the accreditation outcome.</p>
Source of data	<p>Annexures indicating reports presented to the ACC</p> <p>Outcome letters to the institutions</p>
Method of calculation	<p>Numerator: total number of accreditation reports served at the ACC in a financial year and the outcomes, signed by the CEO/ Senior Manager and finalised within a financial year.</p> <p>Denominator: divided by the total number of reports presented to the ACC in a financial year</p> <p>Multiply by 100.</p> <p>Note: Reports that are presented to the ACC and then deferred or referred to the ACC for a decision review at a meeting that falls in the next financial year will be counted in the statistics for both the financial years because they were presented. The outcomes of such reports will be counted in the financial year for which they have been finalised.</p> <p>Improvement reports submitted to the ACC that did not necessitate a site visit will also be counted as presented to the ACC.</p>
Means of verification	<p>Spreadsheet indicating reports presented to the ACC and outcome letters to the institutions.</p>
Assumptions	<p>Reports presented to the ACC may be deferred by the ACC or referred back to the ACC, with meetings held in the consecutive financial year.</p>

Indicator title	3.6.1: Percentage of accreditation outcomes for private education institutions finalised within a financial year
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	To finalise accreditation outcomes of the reports presented to the ACC within a financial year
Indicator responsibility	Senior Manager: E&A

Indicator title	3.7.1: Percentage of identified accredited private education institutions monitored after being granted accreditation
Definition	<p>This indicator measures the percentage of identified institutions monitored after being granted accreditation. Monitoring ensures compliance with the minimum requirements for accreditation.</p> <p>For the 2026/27 financial year, a total of 230 schools will be monitored. From this number, schools that were accredited in 2024/25, the second year after accreditation, and schools whose accreditation certificates expire in 2027, will be selected for monitoring. The remaining number of schools will then be randomly selected for monitoring during the 2026/27 financial year.</p> <p>Private colleges that were accredited in 2024/25, the second year after accreditation, as well as institutions that were accredited in 2022/23, the fourth year after accreditation, will be monitored during the 2026/27 financial year.</p> <p>This excludes accredited institutions falling into the identified category of undergoing “extension of scope” in that year and institutions that have closed down since being awarded accreditation. It also excludes private colleges that were accredited to offer the N1-N3 Engineering Studies programmes, which were phased out at the end of 2025.</p> <p>Monitoring refers to a process of checking to ascertain whether accredited private education institutions continue to maintain the minimum standards required for accreditation, which begins with either the receipt of a monitoring report or a monitoring site visit.</p> <p>Accreditation means the outcome of a quality assurance process of evaluating and determining whether a private education institution has the capacity to offer a qualification or programmes leading to a qualification registered on the GFETQSF.</p>
Source of data	<p>Spreadsheets indicating the dates of accreditation of private education institutions.</p> <p>Spreadsheets indicating the date of receipt of the monitoring reports or, in the absence of a submitted report, the date of the monitoring site visit.</p> <p>The total number of completed monitoring reports submitted to the internal accreditation committee and the Accreditation Committee of Council.</p>
Method of calculation	<p>Numerator: Number of identified institutions that have been monitored in the required period</p> <p>Denominator: Number of identified institutions that are required to be monitored in that financial year</p> <p>Multiply by 100</p>
Means of verification	<p>Spreadsheet outlining the institutions identified for monitoring, as well as the date of monitoring (i.e., date of receipt of the monitoring report or the site visit).</p>

Indicator title	3.7.1: Percentage of identified accredited private education institutions monitored after being granted accreditation
Assumptions	Private education institutions continue to operate in line with their original accreditation at the time of the required monitoring.
Disaggregation of beneficiaries	N/A
Spatial transformation	N/A
Calculation type	Non-cumulative
Reporting cycle	Annual
Desired performance	To monitor identified accredited institutions
Indicator responsibility	Senior Manager: E&A

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