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Evaluation of the ETAO Technical Assistance Model:

Implementation, Value and Implications for Strengthening Practice

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List of Acronyms

Acronym	Full term
AOP	Annual Operations Plan
APP	Annual Performance Plan
CAPS	Curriculum and Assessment Policy Statement
CEM	Council of Education Ministers
DBE	Department of Basic Education
DDG	Deputy Director General
DGMT	DG Murray Trust
DHET	Department of Higher Education and Training
EDC	Education Development Centre
EHRD	Education Human Resource Development
EMIS	Education Management Information System
ETAO	Education Technical Assistance Office
FET	Further Education and Training
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
HEDCOM	Heads of Education Departments Committee
M&E	Monitoring and Evaluation
MST	Mathematics, Science and Technology
MTbBE	Mother Tongue-Based Bilingual Education
NDP	National Development Plan
NECT	National Education Collaboration Trust
NICPD	National Institute for Curriculum and Professional Development
NLU	National Language Unit
OTDP	Online Teacher Development Platform
PanSALB	Pan South African Language Board
PIRLS	Progress in International Reading Literacy Study
PM	Project Manager
QA	Quality Assurance
RTI	Research Triangle Institute
SACE	South African Council for Educators
SASE	South African School Education
SEACMEQ	Southern and Eastern Africa Consortium for Monitoring Educational Quality
SONA	State of the Nation Address
SOP	Standard Operating Procedure
TA	Technical Assistant
TIMSS	Trends in International Mathematics and Science Study
ToC	Theory of Change
TSM	Three Stream Model
TVET	Technical and Vocational Education and Training
UNICEF	United Nations Children's Fund
VVOB	Flemish Association for Development Cooperation and Technical Assistance

Executive Summary

Purpose and focus of this evaluation

This evaluation reviews the implementation and early effects of technical assistance delivered through NECT's Education Technical Assistance Office (ETAO), aligned with the Zenex Foundation's investment. It examines how support functions across the ETAO lifecycle—from needs identification to exit—and how effectively the model builds system capacity within DBE. Out of scope for this evaluation is a review of individual TA products or outputs, and the long-term outcomes and impact. The emphasis is on what worked, what didn't, and how the model can be strengthened to improve both system-level capacity and individual skills.

ETAO's positioning and mandate

Within the DBE–NECT partnership, ETAO is the mechanism through which the NECT organises, manages and embeds specialised technical assistance within the DBE in support of national reform priorities. Formalised in 2019, ETAO's mandate is to mobilise and coordinate technical assistance that accelerates the establishment, adoption and initial implementation of the DBE's key strategic pillars under the NDP and the Action Plan for Schooling 2030 agenda. ETAO is positioned at systems level rather than as a parallel delivery unit or standalone project implementer, working in the *'missing middle'* of the system – the practical delivery architecture, reform-coordination forums and institutional routines that connect national policy to classroom practice, but which are often weakly staffed or not formally defined in DBE.

ETAO roles and governance

ETAO's support architecture extends beyond the deployment of individual specialist TAs and relies on a layered partnership between DBE and NECT. NECT, operating outside formal DBE structures, provides the operational backbone by mobilising and holding funding, managing contracts, recruiting PMs and TAs, and maintaining governance, quality assurance and accountability to funders. Within this framework, DBE leadership and unit heads retain ownership of reform priorities, technical direction and key decisions, while drawing on ETAO as a mechanism to access and coordinate specialised capacity they could not easily appoint or manage within standard public-sector arrangements.

In more complex and coordination-intensive reform domains, ETAO's model deliberately combines embedded project management roles with specialist technical advisors. PMs are placed full-time in central DBE units, where they translate broad reform agendas into sequenced workplans, broker alignment between branches and statutory bodies, oversee multiple TAs, and manage the practical logistics that keep pilots, consultations and national processes moving. TAs, in turn, are contracted on fixed-term assignments to bring scarce technical expertise into priority areas such as curriculum review, MTbBE, assessment analytics and institutional design, working alongside DBE officials rather than as external consultants.

How the ETAO creates value

This evaluation finds that ETAO is best understood not as a generic consulting or training mechanism, but as a differentiated systems-support model operating across multiple reform environments within DBE. ETAO creates value by combining specialist expertise with embedded coordination, adaptive implementation support and systems strengthening inside live reform processes.

While individual skills transfer does occur, ETAO's primary contribution is broader systems capacity creation: strengthening how reforms are coordinated, managed, embedded and sustained within DBE structures. Capacity gains therefore occur at multiple levels simultaneously.

Level of capacity	**Illustrative contribution**
Individual and team capability	Mentoring, co-working, curriculum writing support, assessment analytics exposure and technical specialist development
Organisational capacity	New routines, governance structures, templates, monitoring systems, implementation tools and operational workflows
System-level capacity	Reform coordination, institutional alignment, coalition-building, policy traction and sustained reform momentum

The evaluation finds that ETAO's value creation mechanisms differ across reform environments. More bounded technical reforms, such as assessment, rely primarily on specialist TA deployments with clearer outputs and shorter time horizons. More complex and system-oriented reforms, such as Curriculum Strengthening and MTbBE, require more embedded and coordination-intensive forms of support, including PM-type roles focused on implementation coordination, stakeholder alignment, operational continuity and systems navigation.

Reform environment	**Typical support configuration**
Bounded technical reform (e.g. assessment)	Specialist TA deployment; clearer outputs; shorter time horizons possible
Cross-cutting reform (e.g. curriculum strengthening)	Combination of specialist TA and embedded coordination support
Systemic / high-ambiguity reform (e.g. MTbBE)	Long-term embedded coordination, relationship management, implementation support and reform catalysis alongside specialist expertise

The inclusion and intensity of these support functions varies across streams and appears responsive to differing levels of reform complexity, institutional readiness and implementation ambiguity. In this sense, ETAO functions less as a single standardised TA model and more as an adaptive support architecture operating across multiple reform contexts.

Although this differentiated implementation logic is visible in practice, it is not yet fully articulated as a shared operational model. Expectations around role types, time horizons, reporting intensity, sustainability and institutionalisation pathways therefore remain unevenly specified across streams rather than guided by explicit design principles.

How the lifecycle is working: process summary

The table below summarises the evaluation's findings across the six stages of the ETAO lifecycle.

Lifecycle stage	ETAO contribution / strengths	DBE / system environment constraints
Planning and needs identification	ETAO supports structured prioritisation through annual planning cycles, MTbBE readiness assessments, and TA assessment frameworks aligned to APP priorities.	Urgent politically driven commitments can emerge outside annual planning cycles, requiring rapid adaptation and creating pressure on existing portfolios.
Approval	Layered approval processes support strategic alignment between DBE, NECT and funders before recruitment.	Timing of funding flows, procurement and contracting processes can delay implementation start dates and compress delivery timelines.
Selection and contracting	ETAO recruits high-calibre TAs through strong professional networks; DBE retains final selection authority; standardised templates and rate bands improve consistency.	Contract renewals and onboarding remain vulnerable to funding uncertainty and delayed approvals, creating instability for longer-term reform work.
Induction and onboarding	ETAO introduced a strengthened induction package in 2024; PM support, weekly meetings and peer learning structures support integration and alignment.	Consistency across streams is still emerging and depends partly on local management capacity and maturity of individual reform streams.
Day-to-day delivery and management	PMs provide critical coordination, relationship management and quality assurance; TAs consistently deliver high-level technical expertise and adaptive support.	PM roles frequently absorb functions beyond formal scope due to limited internal administrative and coordination capacity; heavy reporting requirements partly reflect accountability expectations linked to donor and public-sector environments.
Exit, skills transfer and institutionalisation	ETAO increasingly supports institutionalisation through handover processes, training, embedded collaboration, tools, frameworks and system routines rather than only stand-alone deliverables. Several streams demonstrate emerging transfer of operational ownership and internal capability.	Institutionalisation remains uneven across reform streams. Sustainability is strongest where reforms are linked to operational systems or dedicated structures, but more complex conceptual or cross-cutting reforms remain vulnerable to staff turnover, funding uncertainty and uneven long-term system ownership.

Where ETAO is adding the most value

Five areas of genuine, documented contribution stand out:

- **Policy and system design**: Translating broad reform mandates into implementable strategies, frameworks and tools – most visibly in MTbBE (NLU establishment, multi-pillar strategy, bilingual assessment pilots, SONA and Cabinet-level recognition) and Curriculum Strengthening (curriculum review architecture, standards-aligned writing processes).
- **Coalition and relationship building**: Creating structured working relationships across DBE units, statutory bodies and provincial actors that did not previously exist or function effectively – described by multiple stakeholders as essential to moving complex reforms forward.

- **Specialist expertise that DBE cannot source independently**: Particularly in psychometrics, multilingual system design and advanced curriculum architecture – functions that require deep expertise not available in standard public sector career paths.
- **Adaptive practice and learning**: MTbBE in particular has functioned as a learning laboratory, developing readiness assessments, SOPs and digital channels that provide a tested template for other streams.
- **A discourse shift on language and reading**: The MTbBE work has shifted how language, reading and multilingualism are understood in the system – moving from a niche technical concern to a national priority reflected in policy, strategy and political signals.

Where the model needs to strengthen

Four structural gaps recur across all streams:

Coordination intensity and role stretch

More complex and system-oriented reform environments require significantly greater coordination, relationship management and operational continuity than bounded technical streams. In practice, PMs and some senior TAs frequently operate across technical, strategic and implementation domains simultaneously, including coordination, stakeholder alignment, fundraising and advocacy functions. While this flexibility is one of ETAO's strengths, it can also create role stretch, hidden subsidy and blurred expectations where role boundaries and support requirements are not explicitly defined.

Sustainability and institutionalisation

ETAO contributes to institutionalisation through embedded working, co-development, tools, routines and governance structures rather than only through stand-alone deliverables. However, institutionalisation pathways are not consistently specified across streams. The intention is not for DBE to internalise all specialist expertise, particularly in highly technical or research-intensive domains, but institutional memory around reform logic, implementation decisions and use of tools often remains concentrated within individuals rather than embedded in enduring organisational routines.

Accountability versus adaptability

The model operates within a strong accountability environment shaped by funder, audit and public-sector reporting requirements. While these systems support oversight and transparency, reporting intensity is experienced as uneven across streams, particularly in more adaptive and coordination-intensive reform contexts where outputs are less bounded and learning is more iterative. Several stakeholders questioned whether current reporting demands consistently generate proportional strategic learning value.

Processes are stronger than the shared model

ETAO's operational processes — including planning, recruitment, contracting, reporting and quality assurance — are comparatively mature and well established. However, the underlying implementation logic guiding how different forms of technical support should operate across varying reform environments is not yet fully articulated as a shared model. As a result, expectations around PM and TA

roles, time horizons, reporting intensity, sustainability and institutionalisation continue to be negotiated case by case rather than guided by explicit design principles. This becomes particularly important in environments characterised by high reform complexity, multiple stakeholders and ongoing DBE staff turnover.

Conclusion

This evaluation set out to understand how well ETAO is functioning as a systems-level instrument for education reform in South Africa, and what adjustments would strengthen its effectiveness across varying reform environments. The findings are broadly encouraging, with several important structural lessons emerging across streams.

ETAO has matured significantly. Its operational backbone is stronger, its most established domains demonstrate genuine strategic and catalytic practice, and its contributions to policy traction, coalition-building, specialist expertise and systems coordination are substantial and well evidenced. The expertise, relationships and adaptive implementation capability needed to support complex reform work are already present within the system.

The evaluation also finds that ETAO functions less as a single standardised TA model and more as a differentiated support architecture operating across very different reform contexts. Some streams rely primarily on bounded specialist expertise, while others require longer-term embedded coordination, adaptive implementation support and systems navigation. Although this differentiated implementation logic is increasingly visible in practice, it is not yet fully articulated as a shared operational model across stakeholders.

As a result, expectations around PM and TA roles, reporting intensity, sustainability pathways, time horizons and institutionalisation are often negotiated case by case rather than guided by explicit design principles. This creates structural strain within the model — particularly in complex reform environments characterised by high coordination demands, multiple stakeholders and ongoing institutional turnover. These are structural tensions rather than implementation failures, and they are addressable.

The four design moves proposed in this report are therefore not aspirational redesigns. They are practical, low-cost adjustments intended to make ETAO's strongest practices more explicit, more consistent and more resilient across streams. Collectively, they ask NECT, DBE and funders to align more deliberately around the conditions required for embedded technical support to contribute to durable systems change.

South Africa's education reform agenda is ambitious, and the institutional environment is genuinely constrained. In that context, ETAO represents a distinctive and difficult-to-replicate mechanism for connecting technical expertise, coordination capability and reform support to national priorities. The task now is not to redesign the mechanism, but to make its differentiated logic more legible, more deliberate and more sustainable over time.

Chapter 1: Introduction

1.1 Purpose and importance of the evaluation

This evaluation responds to the Zenex Foundation's request to review the implementation and early effects of its investment in technical assistance delivered through NECT's Education Technical Assistance Office (ETAO). The focus is on how technical assistance was implemented in practice—its process fidelity, skills transfer and capacity development within key DBE units—rather than on long-term impact or attribution.

The evaluation asks what actually happened during implementation, what worked (or did not) and why, and how the ETAO model might be refined for greater effectiveness and sustainability. It is explicitly designed to serve both accountability and learning functions for Zenex as funder, NECT as implementing partner, and the DBE as the host institution where ETAO's deployed TAs are institutionally located (Guidelines for Securing Technical Assistance, 2023).

This evaluation is timely for three documented reasons:

- A deliberate strategic reset occurred in March 2024 when DBE leadership acknowledged that, despite 29 TA deployments over three years, technical assistance remained "underutilised relative to its potential" and required restructuring (Minutes – NECT-DBE ETAO Strategic Planning Meeting). This reset—consolidating initiatives under Curriculum Systems Strengthening and sharpening entry/exit protocols—provides a natural inflection point for reflection.
- High staff turnover within DBE units poses documented risks to knowledge retention (Team Engagement transcript, p.13); capturing implementation insights while key actors remain in place strengthens organisational learning.
- The Zenex-funded cohort (2024–2025) represents the first cohort where the refined assessment frameworks and integration approach were applied more systematically, offering evidence on whether structural adaptations improved implementation fidelity.

1.2 Methodology

1.2.1 Guiding approach

The evaluation adopts a sequential, mixed methods design. Its primary purpose is to understand how technical assistance was implemented in practice—mapping the real journey from needs identification through exit—and to generate evidence on what worked, what did not, and why. As per the TOR, the focus is on process fidelity. The full aspects of the journey include:

- planning/needs assessment,
- approval,
- selection,
- induction/onboarding,
- management/support,
- handover/exit

Some early effects and high-level impact might be uncovered in the course of the investigation into process; however, a full review and attribution of long-term impact were not within the scope of this project.

1.2.2 Evaluation objectives

The evaluation is structured around three core objectives agreed at the November 2025 alignment workshop:

1. **Codify and systematise the ETAO model**:
    - Map intended versus actual practice across the six-stage TA lifecycle
    - Produce an evidence-based framework identifying where processes were consistently applied, where adaptations occurred, and practical guidance for strengthening fidelity in future deployments.
2. **Evidence value and contribution**: Document tangible outputs and early effects of technical assistance across the three streams where TAs were placed—Assessment reform, Mother Tongue-Based Bilingual Education (MTbBE), and Curriculum Strengthening—to assess alignment with DBE's mandate to "accelerate the establishment, adoption and initial implementation of the key strategic pillars" (Guidelines for Securing Technical Assistance, 2023).
3. **Generate learning for future refinements**: Test key design assumptions against implementation evidence, draw on global benchmarking insights, and propose evidence-based refinements to strengthen ETAO's effectiveness within its current mandate—*without* designing new strategic frameworks or formal Theory of Change documents, which lie outside the evaluation's scope per workshop agreement.

1.2.3 Design and data collection

To address these objectives, the evaluation uses a **sequential, mixed-methods design** built around four main evidence streams.

1.2.4 Document review

Systematic analysis of NECT's ETAO process documentation, TA contracts and ToRs, monitoring tools, and outputs produced by TAs, complemented by a completed desktop benchmarking study of comparable TA models (GIZ, UNICEF, British Council, DGMT, VVOB, RTI, EDC, World Bank).

1.2.5 Key stakeholder interviews:

Semi-structured interviews with "programme architects" and managers (CEO, divisional head, ETAO team) to clarify origin, design intent, governance arrangements and internal perspectives on how the model has evolved.

Name and surname	Designation
Dr Godwin Khosa	CEO
Ms Kanyisa Diamond	Head: Systems Capacity Support and Advisory
Abram Sello Sekokope, Comfort Chauke, Dimpho Chiloane	ETAO

Semi-structured interviews with DBE officials in focus streams as primary "clients" of TA, as well as Technical Assistants and NECT project managers, were conducted to capture supply-side experience of recruitment, induction, support, delivery, and exit.

Designation	Programme
Project Manager	MTbBE
Technical Assistant	MTbBE
Technical Assistant	MTbBE
Chief Director: MST and Curriculum Enhancement Programmes	Curriculum Strengthening
Project Manager	Curriculum Strengthening
Technical Assistants (2)	Curriculum Strengthening

Despite repeated scheduling attempts over a two-month engagement period, interviews with Dr Naledi Mbude-Mehana (Deputy Director-General: National Language Unit, MTbBE) and Ms Cheryl Weston (Chief Director: EHRD) could not ultimately be secured due to diary constraints. Their perspectives are nonetheless reflected indirectly through programme documentation, reports and the accounts of operational stakeholders working closely within these streams. While their direct input would have added additional strategic perspective, sufficient evidence was obtained to support the process-oriented objectives and findings of this evaluation.

1.2.6 Internal process mapping and validation

A process-mapping session with the ETAO team to document the actual implementation flow against the six core stages (planning and needs assessment, approval, selection, induction/onboarding, management/support, handover/exit).

Validation engagements with NECT formed part of the methodology.

Given the relatively small cohort of TAs, the design prioritises qualitative depth, contextual nuance and triangulation over statistical generalisation.

1.2.7 Analytical framework

Findings are organised using two complementary lenses that mirror the strategic alignment workshop.

ETAO process lifecycle

- The lifecycle stages provide a backbone for analysing implementation fidelity, bottlenecks, adaptations and quality at each point in the TA journey.

Evaluation objectives

- Cross-cutting analysis against the three objectives - codify (process understanding), evidence (lessons/learnings) and future-proof - ensures that insights from documents, interviews, process mapping and benchmarking feed directly into clear lessons and design options.

In line with the agreed evidence-based approach, the analysis deliberately avoids retrofitting the original project theory of change. Instead, it builds an empirically grounded narrative of how ETAO operated in this period and uses that to inform a refined strategic logic and improvement roadmap for the model.

Chapter 2: Design Intent

2.1 Introduction

This section provides the institutional and design context needed to interpret how technical assistance was implemented in practice during the Zenex-funded period. It summarises the environment in which ETAO operates, NECT's role in the reform ecosystem, and how the ETAO model has been structured and adapted over time.

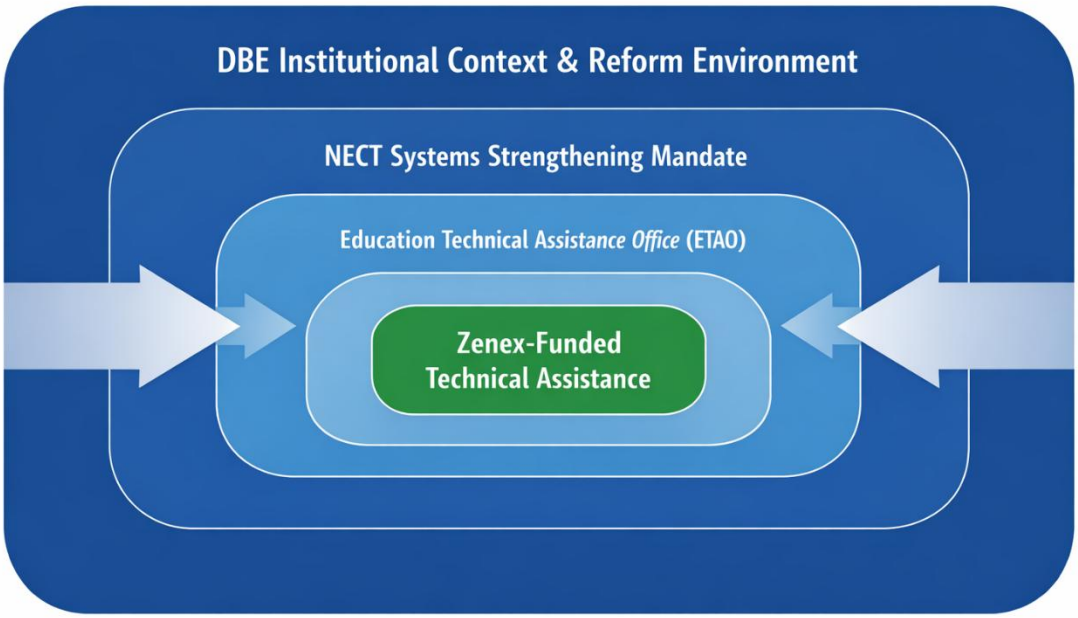
The purpose is threefold.

First, to outline the DBE reform context and capacity constraints that ETAO was created to address, so that subsequent findings about process and value are read against the right baseline.

Second, to describe ETAO's institutional positioning within the DBE–NECT partnership and the main design choices that shape how technical assistance is deployed.

Third, to summarise the intended operational model and its recent evolution, providing a clear reference point for the process-focused analysis in Sections 4 and 5, which compare this design with what actually happened in implementation.

ETAO aligns with NECT's broader systems-strengthening orientation, operating at the level of delivery architecture, reform coordination and institutional capacity rather than direct programme implementation. Zenex-funded technical assistance therefore sits within a layered institutional logic: DBE reform implementation → NECT systems-strengthening mandate → ETAO deployment mechanism → Zenex-funded technical assistance



The sections that follow examine each of these layers in turn, beginning with the broader reform context within which ETAO operates.

2.2 Political economy influences on ETAO's operating environment

Understanding how ETAO operates — and why certain structural tensions persist despite strong technical delivery — requires situating the model within the political economy of South African education reform. This section draws on both the broader reform context and the empirical evidence gathered in this evaluation to surface the dynamics that shape what ETAO can and cannot do in practice.

2.2.1 The reform ambition and the implementation gap

Since the democratic transition in 1994, South Africa has pursued an ambitious basic education reform agenda combining curriculum change, expanded access and pro-poor resourcing (Fiske & Ladd, 2004; DBE, 2024). The introduction of Curriculum 2005, its revision into the Revised National Curriculum Statement, and the subsequent consolidation into Curriculum and Assessment Policy Statement (CAPS) were intended to modernise content and signal a break from apartheid-era syllabi (Jansen, 1999; Chisholm, 2005). Expanded funding, the rollout of no-fee schools, nutrition programmes and infrastructure investment further reflected a strong policy commitment to equity and redress (Fiske & Ladd, 2004; Van der Berg et al., 2011).

Despite these gains, a substantial body of research and recent DBE reviews converge on a central diagnosis: implementation capacity remains a binding constraint (Jansen, 2003; Sayed et al., 2013; DBE, 2024). Policy design has consistently run ahead of the system's ability to support teachers and schools, particularly in historically disadvantaged areas where instructional leadership, subject expertise and district-level support are weakest (Taylor et al., 2013). Large-scale assessments — PIRLS, TIMSS, SEACMEQ and national systemic evaluations — consistently show deep, structurally embedded inequalities in learning outcomes, with the majority of learners not mastering basic literacy and numeracy competencies by the end of the foundation phase (Spaull, 2013; Van der Berg et al., 2011).

It is precisely this gap between reform ambition and implementation capacity that ETAO was designed to address. Its mandate — to accelerate the establishment, adoption and initial implementation of DBE's key strategic pillars — positions it at the missing middle between national policy commitments and the institutional and technical capability required to make those commitments workable (DBE/NECT, 2023 — Guidelines for Securing Technical Assistance).

2.2.2 Fiscal constraints and unfunded mandates

South Africa's fiscal environment places hard limits on DBE's ability to expand its permanent establishment or ring-fence dedicated funding for new reform priorities (National Treasury, 2024). Internal reports on MTbBE and the Three Stream Model describe these initiatives as unfunded or partly funded mandates — where political commitment is clear but Treasury allocations are insufficient to fully resource or institutionalise the work (Zenex, 2025 — MTbBE Assessment Report; NECT, 2023 — EXCO Inputs). The Three Stream Model is explicitly noted in NECT programme reports as resource-intensive and currently dependent on donor funding and projectised management arrangements to sustain momentum, with vocational and occupational pathways particularly affected (NECT, 2023 — EXCO Inputs). MTbBE and Curriculum Strengthening similarly operate on year-to-year funding cycles, with teams knowing broadly what they need to do over a two-to-three year horizon but unable to plan with certainty beyond the current cycle.

This fiscal reality directly shapes ETAO's design logic. Donor-funded technical assistance functions as a capacity accelerator — injecting high-level expertise into reform processes without permanently increasing the wage bill. It is a pragmatic response to HR moratoria and expenditure ceilings that are unlikely to ease in the near term (DBE/NECT, 2023 — Guidelines for Securing Technical Assistance). But this same logic introduces structural risks that this evaluation identifies as persistent gaps: short contracts, late renewals, scope decisions shaped by what funders will support rather than what reforms require, and limited ability to plan exit and institutionalisation with confidence. Project managers describe planning idealistically at the start of each year and then narrowing to what current funders will pay for — a pattern that recurs consistently across all three streams examined in this evaluation. DBE reflection reports explicitly recognise dependency and sustainability as areas requiring mitigation through institutionalisation and skills transfer (DBE, 2025a — Curriculum Strengthening Reflection; DBE, 2024 — Assessment Reflection).

2.2.3 Organisational structures and the missing middle (and what it means)

A second dynamic concerns the misalignment between DBE's existing organisational structures and the demands of cross-cutting, future-oriented reforms. The Curriculum Strengthening reflection report notes explicitly that the DBE organogram was not designed to accommodate large-scale curriculum review and development as an ongoing function, and that the absence of dedicated posts for project management and technical leadership limits the Department's ability to absorb and retain capacity from technical assistants (DBE, 2025a — Curriculum Strengthening Reflection). Similar structural tensions are documented in MTbBE, where a relatively small National Language Unit carries responsibility for system-wide implementation across curriculum, assessment, language policy and provincial rollout (Zenex, 2025 — MTbBE Assessment Report).

Assessment reforms add a further layer of complexity. Turning data from TIMSS, SEACMEQ and national systemic evaluations into actionable insights requires advanced psychometric and analytical skills that are not widely available within the public system and are not easily developed through once-off training (DBE, 2024 — Assessment Unit). The Assessment reflection report emphasises that sustaining these capabilities depends on institutional arrangements and ongoing professional development, not just one-off training — requiring stable posts, units and routines that DBE's current structure does not yet consistently provide (DBE, 2024 — Assessment Reflection).

The result is what the evidence consistently points to as a missing middle in state capability — referring to the layer between high-level policy commitments and school-level implementation where the functions needed to make reform work in practice (delivery architecture, coordination, institutional learning and reform management) are weakly staffed, funded or institutionalised within the state itself (Sayed et al., 2013). It is in this gap that ETAO operates (NECT, 2023 — ETAO Board Report). Project managers effectively substitute for a layer of middle management that DBE's current structure and hiring constraints cannot provide, while senior TAs provide specialist expertise that standard public sector career paths do not generate. This is not a peripheral feature of how ETAO works — it is central to its value and its vulnerability.

2.2.4 Multi-stakeholder governance and donor influence

The governance of key reforms is inherently multi-stakeholder, and this shapes what gets prioritised, how it gets resourced and what counts as success. NECT was established as a collaboration between government, business, organised labour and civil society, and ETAO operates within a funding environment where donors have legitimate interests in demonstrable capacity building, visible outputs and sustainability within defined funding cycles (NECT, 2023 — ETAO Board Report).

Zenex reports explicitly emphasise on-the-job skills transfer, capacity development of DBE officials, and the development of process documents and expert databases to institutionalise TA management within the Department (Zenex, 2025 — MTbBE Assessment Report).

These interests are not in conflict with DBE's reform agenda, but they do create tensions in practice. Reporting requirements expand to meet audit and accountability demands that serve funder assurance functions, but are experienced by TAs and PMs as administratively heavy and of limited strategic value. Zenex reports highlight tensions associated with projectised funding — fragmented TA deployments, administrative burdens and pressure to deliver visible outputs within short funding cycles (Zenex, 2025). DBE managers similarly note that multiple TA funding channels can lead to uncoordinated efforts if governance mechanisms are not carefully designed (DBE, 2025a — Curriculum Strengthening Reflection).

ETAO's governance architecture — linking DBE, NECT and funders through formalised guidelines, assessment frameworks and joint steering processes — is a deliberate design response to these dynamics (DBE/NECT, 2023 — Guidelines; NECT, 2023 — ETAO Board Report). It seeks to harness donor resources and multi-stakeholder expertise while maintaining alignment with DBE priorities and minimising fragmentation. The evidence in this evaluation suggests this architecture is broadly working, but that it places significant coordination and relationship management demands on project managers and ETAO staff that are not always recognised or resourced in formal role definitions.

2.2.5 Political signals and reform prioritisation

A fourth dynamic concerns the role of political signals in shaping which reforms gain traction and how quickly. In MTbBE, a rapid assessment conducted through NECT highlighted that the language question is critical and had not been sufficiently addressed, prompting DBE to request support in establishing the National Language Unit and developing an MTbBE strategy (Zenex, 2025 — MTbBE Assessment Report). SONA-level commitments and Cabinet-level recognition of the language and reading agenda subsequently elevated this technically complex reform to national priority status, unlocking resourcing and institutional support that would otherwise have been difficult to secure. The establishment of the National Language Unit and the appointment of a dedicated DDG to lead the MTbBE agenda are direct outcomes of this political visibility, and they represent genuine system-level gains.

At the same time, interview evidence in this evaluation notes that urgent, politically driven commitments occasionally surface outside ETAO's annual planning cycle and have to be retrofitted into existing workplans, adding pressure to already stretched delivery teams. This dynamic cuts both ways. Political visibility can accelerate reform and protect it from budget pressures — as the MTbBE experience illustrates. But it can also compress timelines, distort priorities and create expectations of rapid results in reform areas that require sustained, multi-year engagement to yield durable change.

2.2.6 What this means for ETAO

These political economy dynamics help explain many of the implementation realities observed through this evaluation. The operating tensions identified across the three reform streams — including broad role scopes, short-cycle contracting arrangements, evolving institutionalisation pathways, and adaptive rather than fully formalised implementation logics — are not primarily indicative of poor implementation or design weaknesses within ETAO itself. Rather, they reflect the practical re-

alities of operating a systems-level reform support mechanism within a fiscally constrained, organisationally complex, multi-stakeholder environment shaped by uneven institutional capacity and shifting reform priorities.

Recognising this context is important because it clarifies where different forms of strengthening and adaptation are most appropriately located. Some refinements identified in Chapter 6 sit within ETAO's own sphere of influence — for example, clarifying role archetypes, making transition pathways more explicit, and calibrating reporting requirements according to implementation complexity. Others, however, require continued joint engagement between DBE, NECT and funding partners around the broader structural conditions that shape what embedded technical assistance can realistically deliver and sustain over time. The evidence from this evaluation suggests that ETAO is often operating not only as a provider of technical expertise, but also as part of the coordination and implementation infrastructure required to carry complex reforms forward under constrained conditions.

2.3 NECT's Institutional Positioning in the Reform Ecosystem

The National Education Collaboration Trust was created as a multi-stakeholder platform to support national education reform, working alongside the Department of Basic Education rather than as a standalone programme implementer.

From the outset, NECT has framed its mandate in **systems** terms, focusing on how policy, coordination and delivery architecture (the structures and processes that connect national policy to classroom practice) enable or constrain improvement in schools, rather than only on school-level projects.

In practice, this means NECT operates outside formal DBE structures but in close partnership with national, provincial and district authorities. Its location as an intermediary allows it to mobilise non-state funding, convene diverse actors, and recruit specialised expertise with greater flexibility than standard public-sector arrangements. Technical assistance has become one of NECT's main instruments within this role, used to help DBE translate complex policy shifts into workable programmes, strengthen key reform units, and test new delivery arrangements at system level. In line with NECT's broader systems orientation, ETAO is intended to work on the 'missing middle' of delivery architecture, coordination and feedback loops, rather than only on producing technical outputs

Within this broader mandate, the Education Technical Assistance Office is NECT's primary mechanism for organising and managing technical assistance in support of DBE reforms. ETAO enables NECT to channel specialist advisors into central DBE units while maintaining a structured framework for deployment, governance and accountability across funders and reform domains.

2.4 ETAO origin and evolution

The Education Technical Assistance Office (ETAO) emerged from the Department of Basic Education's efforts to implement a series of major reforms aligned with the National Development Plan (NDP) and the Education Action Plan. These reforms included the introduction of the Three Stream Curriculum Model, the establishment of the National Institute for Curriculum and Professional Development (NICPD), and the migration of the Early Childhood Development (ECD) function from the Department of Social Development to the DBE. As these reforms moved from policy intent to implementation, the Department recognised the need for additional specialised technical and project

management capacity to support their establishment and institutionalisation. In response, the DBE partnered with the National Education Collaboration Trust (NECT) to establish a dedicated mechanism through which technical expertise could be mobilised, coordinated and managed in support of priority reform initiatives.

ETAO was subsequently formalised in 2019 as a dedicated mechanism to coordinate and oversee technical assistance in support of key strategic priorities within the basic education sector. Located within NECT, its mandate is to support the establishment, adoption and initial implementation of strategic reforms that contribute to the objectives of the NDP and the Schooling 2030 agenda. Over time, ETAO's role expanded beyond support for individual reform initiatives to become a broader platform through which specialised expertise could be deployed to assist the DBE in navigating complex policy, institutional and implementation challenges.

Documentation shows a clear evolution from ad hoc placements toward a more structured model:

- The **2023 Guidelines** codified six design principles governing all TA deployments: stakeholder engagement, organisational and strategic integration, policy continuity, status and contextual assessment, planning and programme requirements, and critical implementation requirements (Guidelines 2023, Section 3).
- **Domain-specific assessment frameworks** (Assessment, MTbBE, Three Stream Model, Teacher Development, Social Mobilisation) were developed to prioritise TA requests using consistent criteria including strategic leverage, absorptive capacity, sustainability and affordability (TA Assessment Framework Tools, 2024).
- A **strategic reset in March 2024** acknowledged that despite 29 deployments over three years, technical assistance remained "underutilised relative to its potential," prompting consolidation of initiatives under Curriculum Systems Strengthening and sharper focus on entry/exit protocols (Minutes – NECT-DBE ETAO Strategic Planning Meeting, 4 March 2024).

ETAO was conceived not as a parallel delivery structure, but as a catalytic reform mechanism. Its role is to accelerate the conceptualisation and early-stage operationalisation of reform agendas that exceed the Department's existing structural, budgetary or skills flexibility. In this sense, ETAO is designed to support the initiation and structuring of complex policy shifts, enabling them to "get off the ground" within a constrained public administration environment.

2.5 Conceptualisation of technical assistance in ETAO

2.5.1 Defining Technical Assistance

For NECT, technical assistance is a systemic support function rather than generic consulting. The CEO describes TA as filling the gap between ambitious policy and the state's ability to design and implement workable programmes, especially where specialised expertise and institutional memory are missing. In this framing, "technical" refers to deep capabilities at the centre of policy and programme design – curriculum, assessment, language policy and major function shifts – not routine operational or administrative support.

This view underpins a clear distinction between technical assistance and consulting that was reinforced at the March 2024 DDG workshop. In general terms consultants are seen as delivering bounded products against a terms of reference and then exiting, with limited responsibility for whether the broader system changes. NECT technical assistants, in addition, are expected to work from inside the system over time, with sufficient seniority and domain expertise to match or exceed

DBE counterparts and to share responsibility for making the whole intervention work and strengthening sustainable capacity.

In practice, deployments may sit along a spectrum between the two categories presented below, and a pure consulting role is not outside what is possible if needed; however, the intention is not for it to be a consulting role.

Technical assistance versus consulting (working distinction)

Dimension	Technical assistance (ETAO intent)	Consulting (typical model)
Positioning	Most often embedded, co-working within DBE units	External service provider
Primary contribution	Enable implementation and strengthen internal capacity	Deliver a defined product or analysis
Accountability	Shared responsibility for system functioning	Responsibility for agreed deliverable
Time horizon	Medium-term, adaptive engagement	Time-bound assignment
Sustainability focus	Explicit institutionalisation and skills transfer	Limited; adoption often outside scope

(Note: The Assessment stream appears closest to a traditional consulting or specialist advisory model within ETAO, due to its highly technical focus, clearly defined deliverables, analytical outputs, and alignment to international benchmarking and reporting processes. However, unlike conventional consulting, the TAs are embedded within DBE structures and contribute to ongoing institutional processes, coordination, and capability strengthening over time. This positions the Assessment stream as a more implementation-focused and technically bounded form of embedded technical assistance, distinct from the broader systems transformation and change-facilitation approaches seen in streams such as MTbBE and Curriculum Strengthening.)

ETAO has translated this systems-oriented stance into differentiated support roles and practical deployment structures. The programme distinguishes between senior, mid-level and junior technical support profiles based on qualifications, experience and expected strategic contribution, and applies standardised rate bands (with an upper ceiling) to manage affordability and parity across deployments. These profiles are intended to safeguard the technical character of deployments — pushing back when requests drift toward general administrative support — while also structuring discussions with DBE and funders around the appropriate mix of expertise, coordination and implementation support required in different reform environments.

The evaluation also found that ETAO's support architecture is broader than specialist TA deployment alone. In more complex and coordination-intensive reform areas, embedded PM-type roles form part of the technical support model, particularly where reforms require sustained stakeholder alignment, operational continuity, systems navigation and adaptive implementation management alongside specialist expertise. The intensity and configuration of these roles varies across streams

and appears responsive to differing levels of reform complexity, institutional readiness and implementation ambiguity.

These differentiated support functions position ETAO's deployments as embedded reform partners working on how key subsystems operate and interact, rather than as external consultants delivering isolated products. This is consistent with the Guidelines' emphasis on technical assistance that is well-informed, practically relevant and contributes to strengthening institutional capability within DBE over time.

2.5.2 Comparative Framing: Technical Assistance in International Practice

The conceptual distinction between technical assistance and consulting reflected in the ETAO model is consistent with established international practice. Across development contexts, technical assistance is increasingly framed not as short-term advisory input but as an embedded systems-strengthening instrument.

For example, the World Bank defines technical assistance as the provision of specialised expertise to strengthen institutional capacity, improve policy implementation, and support systems development, often through sustained engagement rather than discrete deliverables (World Bank, 2012). Similarly, agencies such as GIZ emphasise long-term partnership models in which advisors are integrated within public institutions to support reform processes, institutionalisation, and adaptive implementation rather than the production of standalone outputs (GIZ, 2020). Organisations such as VVOB and DGMT adopt comparable approaches, positioning technical advisors as co-working partners within ministries and departments, with explicit expectations regarding skills transfer, ownership, and sustainability.

Across these models, several shared design features are evident:

- Embedding of advisors within host institutions,
- Emphasis on institutional capacity strengthening rather than product delivery,
- Co-production of solutions with government counterparts, and
- Explicit attention to sustainability and handover.

These models also recognise that technical assistance operates within complex political and organisational environments.

In contrast, conventional consulting arrangements typically centre on defined outputs, bounded scopes of work, and limited accountability beyond deliverable completion.

The ETAO model's conceptual framing of technical assistants as embedded partners working on subsystems of curriculum, assessment, language policy, and institutional reform therefore aligns with prevailing international interpretations of technical assistance as a systems-level reform instrument. At the same time, the South African institutional context — including governance structures, fiscal constraints, and state capacity dynamics — introduces distinct design considerations that require contextual adaptation rather than direct replication of international models

2.5.3 Systems capacity building versus individual skills transfer

ETAO's design is framed through a systems lens. The distinction articulated by senior leadership is between the schooling system (schools) and the systems level (circuits, districts, provinces and national structures that support schools), with systemic thinking focused on relationships, alignment

and feedback loops across these levels. Within this framing, technical assistance is intended primarily to strengthen the system's ability to design, steer and learn, rather than only to upgrade the skills of individual officials.

This orientation shapes how capacity building is understood. Systems capacity building refers to strengthening institutional arrangements, delivery architecture, governance forums and routines that enable large-scale change – for example curriculum working groups, national language units, assessment steering structures and mechanisms such as the Curriculum Systems Strengthening Working Group and national consultative forums. Individual skills transfer refers to developing specific competencies among named officials, such as training curriculum writers or assessment specialists in particular methods. ETAO's design seeks to influence both levels, but assigns strategic primacy to system-level levers, with embedded collaboration intended to contribute to strengthened institutional capability over time.

Benchmarking analysis undertaken as part of this review indicates that international systems-strengthening approaches commonly frame capacity development in terms of institutional arrangements, delivery architecture and feedback mechanisms, rather than solely individual skills acquisition. ETAO's design reflects a similar orientation by positioning technical advisors at system level to support coordination, institutional structuring and routine-setting, while also incorporating targeted skills transfer where appropriate.

In newly emerging reform domains, the model recognises that operational pathways and success indicators may evolve as implementation unfolds. Where reform areas represent significant system shifts, deliverables may require iterative refinement as conceptual frameworks are translated into practice. The design therefore accommodates a degree of adaptive learning, particularly in areas where precedent or prior implementation models are limited.

2.5.4 ETAO as a hybrid model: international comparative positioning

Comparative benchmarking undertaken as part of this evaluation situates ETAO within a wider landscape of technical assistance and capacity development models used by international agencies and philanthropic actors (for more information refer to the benchmarking report document).

The benchmarking shows that these models vary in their time horizons, institutional location, governance arrangements and depth of system influence, ranging from results-based and projectised approaches to more embedded, partnership-based and catalytic forms of support.

Viewed through this lens, ETAO is best understood as a hybrid model rather than as a clear example of any single archetype. It shares important features with longer-term system-strengthening approaches, particularly its use of embedded advisors, joint steering arrangements and a focus on organisational routines, delivery architecture and institutional capacity rather than only discrete technical products. In this respect, ETAO most closely resembles the "architect" and "change facilitator" models identified in the benchmarking.

At the same time, ETAO also performs a catalytic function through NECT's intermediary role. Beyond supporting embedded technical assistance, NECT helps to mobilise external funding, convene multi-stakeholder processes and align actors around key reform agendas, extending ETAO's influence beyond the immediate advisor–unit relationship. This gives the model a wider system-facing character than a conventional embedded advisory mechanism alone.

This hybrid positioning reflects the conditions in which ETAO operates. Locating the mechanism within NECT creates flexibility for contracting, coordination and resource mobilisation, while embedding advisors within DBE units and using joint governance arrangements is intended to maintain alignment with departmental priorities and support institutionalisation rather than parallel delivery.

The benchmarking also suggests that hybrid models of this kind carry inherent tensions. They are often pulled in one direction by donor requirements, reporting frameworks and short-term delivery pressures, and in another by the longer time horizons and relational work needed for system strengthening and sustained institutional change. In ETAO, this tension is visible in the gap between the embedded, co-working model described in its design and the more output-focused, short-contract reality that funding and reporting structures can produce in practice. Understanding ETAO in these terms is important for interpreting the evaluation findings and for making realistic design choices going forward.

2.6 Governance Architecture and Roles

Having outlined ETAO's conceptual framing as a systems-level technical assistance mechanism, this section describes how that intent is translated into practice through its governance arrangements and roles. ETAO operates within the NECT–DBE partnership, housed in NECT's Division 2 (Systems Capacity Support & Advisory) and overseen by NECT's multi-stakeholder board. Within DBE, ETAO-supported Technical Advisors (TAs) and Project Managers (PMs) are located in central units such as Curriculum, the National Language Unit and Assessment, but are contracted and supported by NECT.

DBE programme leads, including DDGs, Chief Directors and relevant unit heads, define technical needs and provide day-to-day direction, while NECT/ETAO supports needs analysis, sources and contracts TAs and PMs, and is accountable to funders. The model is structured as a partnership rather than a hierarchy, relying on a direct line between DBE managers and ETAO leadership, supported by PMs, and on alignment and mutual trust. Beyond administration, NECT acts as a strategic intermediary, providing a systems-level perspective across reforms, linking DBE units and statutory bodies, and serving as a conduit to funders, with PMs functioning as embedded coordinators and the primary bridge between DBE officials, multiple TAs and the ETAO office.

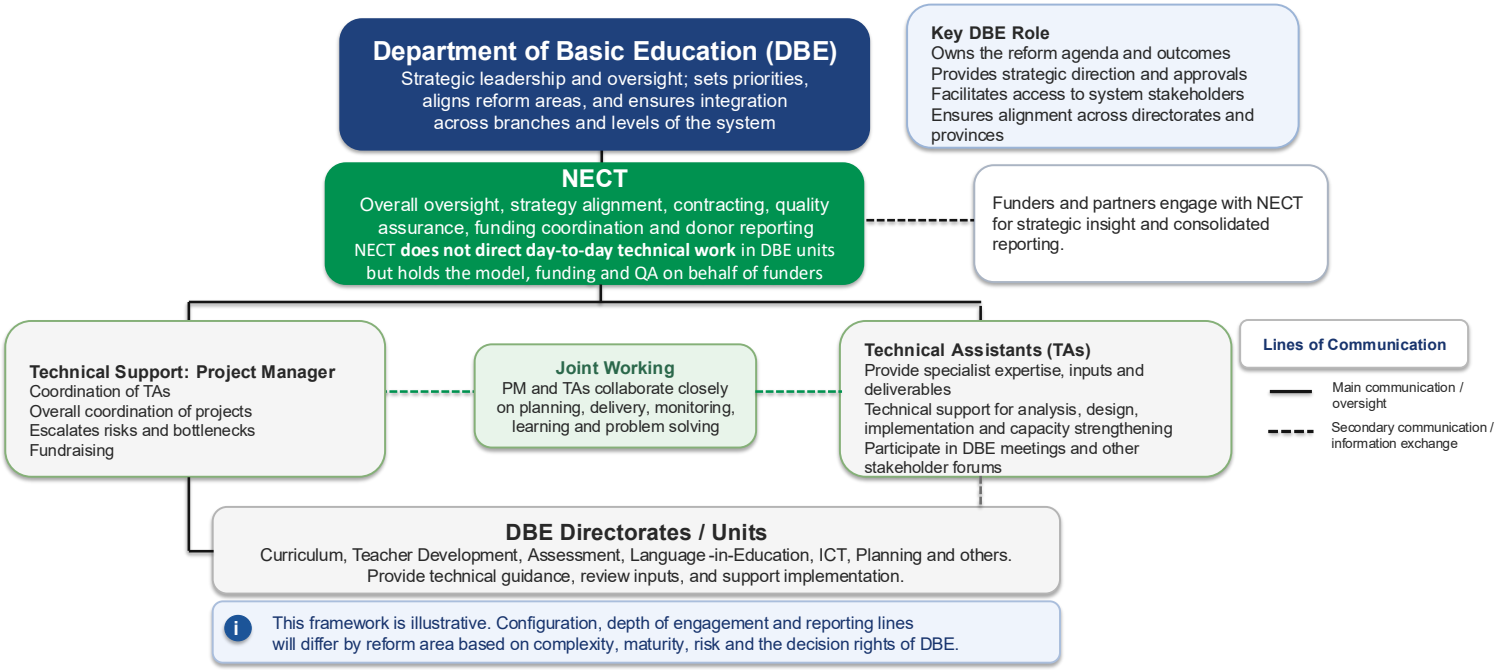
In addition to technical advisory roles, the design allows for dedicated project management support where reform agendas do not sit within fully staffed directorates, particularly during initiation and early structuring phases. This project management function is intended as a time-bound enabling mechanism rather than a substitute for permanent posts, and its use alongside embedded TAs reflects the model's flexibility in responding to differing institutional starting points across reform areas.

The governance and communication diagram should therefore be read as an illustration of reporting and accountability relationships, operational coordination, communication flows and stakeholder positioning; it does not in itself describe the underlying ETAO model or change logic.

ETAO Operating Structure: Governance, roles and communication Framework

Depicts the two more complex environments we reviewed: Curriculum Strengthening and Mother Tongue–Based Bilingual Education (MTBBE).

The intention is not to have this same structure in all environments. Depending on the reform complexity, stakeholder landscape and purpose, the configuration and communication pathways will vary.



The model intentionally preserves DBE ownership of technical direction. DBE leadership defines the objectives, broad scope of work and key success parameters for each reform agenda, and TAs work in close collaboration with designated DBE leads and PMs on agreed workplans and deliverables, rather than as an external parallel stream. NECT's role is to facilitate, contract and support, and to hold accountability to funders for process standards and stewardship of the ETAO approach.

ETAO's processes and ETAO's model – understanding the distinction

Before examining how ETAO operates in practice, it is useful to distinguish between two dimensions of ETAO that this report analyses separately

ETAO's processes refer to the operational systems through which technical assistance is planned, approved, contracted, managed and concluded – the six-stage lifecycle covering needs identification, selection, induction, delivery, quality assurance and exit.

ETAO's model refers to the underlying change logic – the design principles that guide what kinds of technical assistance are deployed for which reforms, over what time horizons, through what mechanisms, and toward what outcomes.

Chapter 3: Process and Implementation Fidelity

Chapter 2 outlined the intended design, governance architecture and strategic positioning of ETAO within the broader NECT–DBE partnership. This chapter shifts focus to how the model operates in practice. The analysis is structured along the lifecycle of a technical assistance deployment, examining planning and needs identification, profiling and recruitment, contracting, deployment, monitoring, and exit processes.

While this lifecycle framework provides a structured view of operational processes, it does not exhaust the full scope of NECT's strategic positioning in the education reform landscape, as described in the design chapter. NECT's broader ecosystem engagement, funder interface and systems-level perspective form part of the partnership context within which TA deployments occur. The focus here, however, is on how the formal TA processes function in practice and the extent to which they align with the intended design.

3.1 Planning and Needs Identification

ETAO's design envisages DBE units identifying technical needs in alignment with strategic priorities and reform agendas, with requests for technical assistance grounded in articulated programme objectives and, where applicable, supported by domain-specific assessment frameworks. These frameworks are intended to guide prioritisation using criteria such as strategic leverage, absorptive capacity, sustainability and affordability.

> "The initial TA contracting was for the development of the National Language Unit – to give life to it. In other words, something that the Department of Basic Education had always wanted to do, but they didn't have the technical know-how in that regard." – TA

Interviews indicate that some requests initially arrive as appeals for general "extra hands" rather than clearly defined technical gaps, with ETAO and DBE needing to negotiate these back into genuine technical assistance aligned to the model's intent.

Following identification and refinement of need, deployments are subject to approval in principle: DBE leadership confirms strategic alignment and validates the requirement for technical assistance; NECT assesses feasibility, mandate alignment and funding availability; and funders approve support within agreed thematic and budgetary parameters. This layered authorisation structure is intended to balance departmental ownership, intermediary oversight and financial accountability before recruitment proceeds.

In practice, ETAO needs identification sits at the intersection of DBE's strategic agendas, unit-level planning cycles and the realities of external funding. Across the three focal domains (Curriculum Strengthening, MTbBE/NLU and Assessment/Curriculum data work), interviewees describe a broadly DBE-driven process in which programme managers and TAs articulate technical gaps against reform priorities, but the scope, timing and depth of support are repeatedly reshaped by funder interests and budget constraints. Interviews also point to variation in how consistently the domain-specific assessment frameworks are used, with some branches drawing on them systematically and others relying more on informal discussions and urgent requests.

Interviews suggest that ETAO needs identification operates at two levels: a high-level DBE reform agenda, and more detailed unit-level annual planning cycles that are repeatedly re-cut to fit external funding. DBE articulates broad, multi-year priorities (curriculum review and 21st-century skills,

MTbBE 2025–2028, vocational pathways), while within those parameters each participating unit (Curriculum Strengthening, MTbBE/NLU, assessment-related work) runs its own annual cycle in which a project manager and key TAs set short-term objectives (within broader objectives agreed with the DBE Chief Directors), map activities and propose TA profiles for the coming year or two. These internal plans tend to be clearer and more coherent than the funding that underpins them: teams broadly know what they would like to do over the next two to three years, but the scope, timing and depth of support are continually reshaped by which components funders are willing to support in a given year and how much money NECT is able to assemble.

In Curriculum Strengthening, the curriculum branch and ETAO have jointly evolved a broad curriculum-review and 21st-century skills agenda from earlier Standard Bank-funded work. Each year, the project manager convenes a strategic planning meeting with the TA team to plan the year ahead, and at year-end they review progress and "plan idealistically" for the following year, identifying technical gaps across research, assessment, teacher development, conceptual writing and knowledge management. *"At the beginning of each year, I have a sort of funding-dependent strategic planning meeting with the team that I have on hand. We plan the year ahead and then at the end of the year we… review the work that's been done and we plan for the following year and we plan idealistically if funding would become available"* – Project Manager

This is converted into a project plan and a list of desired TA roles that is shared with NECT, but the final TA configuration and activity mix are narrowed to what current funders will pay for; in 2026 this has meant dropping much of the cross-branch conceptual and research work in favour of tightly scoped curriculum-writing for specific subjects.

In Assessment and related curriculum-data work, document and interview evidence indicate that needs were identified around large-scale assessment design and analysis (TIMSS, SEACMEQ, systemic evaluation) and the interpretation of complex datasets for policy and planning. Here, TAs are brought in to provide specialised psychometric and analytic skills that DBE's existing posts and career paths do not easily supply, allowing the department to commission and use complex assessment and monitoring exercises it could not design or interpret alone.

Across domains, interviewees confirm that needs identification is formally DBE-driven, but the depth and specificity of initial requests vary. Some asks still arrive framed as generic capacity gaps or administrative "extra hands," requiring negotiation to reshape them into clearly technical TA roles that fit ETAO's mandate and funder conditions. Urgent, politically driven commitments (for example, late ministerial announcements) occasionally surface outside annual ETAO/DBE planning cycles and then have to be retrofitted into existing workplans, adding pressure to already stretched day-to-day delivery, although evidence on the frequency and overall scale of this pattern remains largely anecdotal.

In MTbBE and the National Language Unit, needs arise from national political commitments (responses to national reading results and SONA-level language priorities) and recognised gaps in DBE capacity on multilingual education and corpus development. A rapid assessment on reading and language conducted through NECT highlighted that 'the language question is critical and has not been looked at,' prompting DBE to request support in establishing the National Language Unit and developing an MTbBE strategy. ETAO then assembled a small, high-end team of TAs and a project

manager to translate this mandate into a coherent multi-year programme, with annual implementation plans and budgets specifying required TA inputs, even though DBE posts and budgets still leave many functions dependent on external technical assistance.

3.2 Profiling, Recruitment and Candidate Approval

Once approval in principle has been secured, the design provides for the development of a detailed role profile specifying technical competencies, seniority level and expected deliverables. In design, this includes differentiating between senior "thought-leader" roles, mid-level technical specialists and more delivery-focused roles, so that candidate profiles match the level of complexity and time horizon of each reform. Recruitment processes are coordinated by NECT, with DBE participation in candidate selection to ensure subject-matter relevance and contextual fit. DBE managers report feeling appropriately involved in selection for key posts, while also noting that in more urgent requests or smaller, time-bound assignments the process can move faster and draw more heavily on NECT's existing candidate database, allowing ETAO to respond quickly without lengthy joint processes. This flexibility is generally viewed as positive for responsiveness, provided that DBE is still able to confirm technical suitability and alignment with unit needs before appointments are finalised.

Final appointment decisions are intended to reflect joint agreement between DBE and NECT, maintaining departmental ownership over technical direction while leveraging NECT's contracting and sourcing capacity.

Once approval in principle has been secured, the design provides for the development of a detailed role profile specifying technical competencies, seniority level and expected deliverables. Recruitment processes are coordinated by NECT, with DBE participation in candidate selection to ensure subject-matter relevance and contextual fit.

In practice, the ETAO team indicates that recruitment places significant emphasis on seniority, credibility and relational fit, particularly in system-level reform domains. Beyond technical expertise, candidates are assessed on their ability to navigate complex institutional environments and work effectively within DBE structures. The interviews reveal that recruitment is overwhelmingly network-driven: PMs and NECT draw on people they already know and trust, often re-engaging individuals who have previously worked in the system, with little open advertising or classic "recruitment agency" behaviour. ETAO also maintains a database of PhD-, Master's- and Honours-level experts, which can be used alongside "going to market" and considering DBE-proposed individuals, subject to motivation and standard checks. Inter-

WHAT WE LEARN ABOUT THE TAs

- They are high-calibre specialists and leaders (professors, senior researchers, experienced PMs) with established sectoral reputations before entering the TA system.
- They are strongly values-driven and frame the role as part of a long-term intellectual and social agenda (e.g. language justice, 21st-century skills, curriculum reform), rather than a short-term consultancy assignment.
- They routinely work far beyond contracted hours, often unpaid, and accept very high personal load and stress (including burnout and hospitalisation) because they believe the work matters.
- They are comfortable operating in political and bureaucratic complexity, bridging academia, NGOs and the state, and shifting between high-level strategy and on-the-ground logistics.

viewees note that when timelines are tight, availability and existing relationships sometimes trump ideal profile fit, particularly in highly specialised areas such as MTbBE and assessment analytics.

DBE leads typically participate in interviews or candidate review processes, although the depth of involvement varies by urgency and domain maturity. Managers report that joint interviews allow them to judge both technical competence and whether the person is likely to work in the existing team, while recognising that interviews never give a complete picture. Personal "fit" is considered, but remains secondary to delivery: DBE informants emphasise that they would rather retain a technically strong TA who is less likeable than a popular TA whose outputs are weak, while still encouraging team spirit to avoid tensions that could delay implementation. In practice, the recruitment approach therefore privileges performance over personality, with DBE using joint interviews mainly to check that candidates can contribute effectively to a collaborative team rather than to screen for a narrow notion of cultural fit.

Overall, the profiling and recruitment mechanisms are seen as a relative strength, but interviews also underline that their effectiveness is closely tied to subsequent contracting and funding decisions: slow or fragmented contracting can erode early gains from careful selection and make it harder to retain the desired calibre of TA over time.

3.3 Contracting and Financial Structuring

Technical Assistants (TAs) are appointed on fixed-term contracts linked to defined reform assignments, rather than generic posts. Contract lengths have typically ranged between six and twelve months, with duration calibrated to the type of work: longer engagements for continuity-oriented system roles and shorter contracts for feasibility studies, pilots or tightly bounded technical tasks. Internal grading categories and standardised rate bands are applied to these contracts to maintain parity across deployments and to keep remuneration within agreed funding parameters.

Senior-level approval is required for new appointments, contract extensions and terminations, so contracting decisions sit at executive governance level rather than being processed as routine administration. CEO-level and board-level oversight is documented for issues such as planned extensions, terminations aligned to predefined end-dates, and cases where extensions are considered after a contract has lapsed. Funding envelopes, often earmarked by donor and reform stream, directly shape how many posts can be contracted, their seniority level and how long they can be retained.

Programme documentation and planning tools show TA contracts as assignment-based and tied to clearly defined reform activities, such as NICPD business case development, Online Teacher Development Platform (OTDP) content support, MTbBE implementation planning, curriculum strengthening, assessment analytics and Three Stream Model work. In practice, these deployments often combine bounded deliverables with broader system-building functions, including policy design, institutional structuring and coordination across DBE branches and statutory bodies.

Across interviews, TAs and PMs describe the contracting process as slow, unpredictable and increasingly constrained by funding volatility. Work in DBE units frequently starts before contracts are finalised, creating periods where people feel compelled to contribute outside of a signed contract in order to keep reform timelines on track. TAs also report late shifts in contract length (for example, planned 12-month roles being cut to six months) without a corresponding recalibration of project

design, leaving pilots without an endline phase and raising concerns about fruitless expenditure and reputational risk.

From the ETAO's perspective, 2026 stands out as a period of intensified funding uncertainty and fragmentation, with several streams moving from larger, flexible grant arrangements to more tightly earmarked or reduced funding. This has translated into more frequent short contracts (three to six months), repeated re-motivations and approvals, and gaps between contracts that disrupt implementation, add administrative load and erode planning certainty. At the same time, some long-running system-level roles (for example in MTbBE) continue through sequential renewals, demonstrating that where funding can be secured, the model does accommodate multi-year, continuity-oriented TA support.

3.4 Induction and onboarding

Induction for TAs now combines a basic standard pack on NECT processes with relational, on-the-job orientation led mainly by project managers. The NECT induction materials focus on operational aspects such as contracting, invoicing, reporting tools and internal SOPs, while PMs use weekly core-team meetings, working groups and WhatsApp channels to help TAs navigate calendars, documentation and day-to-day coordination. DBE units remain responsible for their own technical and institutional induction, with DBE supervisors and PMs jointly introducing TAs to key forums and actors and explaining how work fits into unit strategies and structures.

TAs generally report feeling clear on their immediate deliverables and lines of reporting, and note that they come to understand the wider system and funding context progressively through conversations and participation in core meetings rather than through a single, formal start-up event. While there is not yet a common ETAO induction agenda or checklist applied uniformly across domains, examples from Curriculum Strengthening and MTbBE show PMs investing substantial time in orienting TAs to internal structures, committees and processes, and in some cases drawing on DBE administrative staff they have mentored to support logistics and internal procedures.

There are also positive outliers that illustrate what more structured joint NECT–DBE onboarding can look like. One reflection from the National Language Unit describes "successful onboarding" with both NECT and the DBE unit to ensure "seamless integration", and a separate division in the wider organisation uses a detailed first-month induction plan covering tools, SOPs, projects and strategy. Taken together, these examples suggest that the building blocks for a more consistent induction approach already exist, and that the main opportunity lies in consolidating current NECT operational induction materials with clearer DBE-owned orientation on unit mandates, reform pathways and decision-making forums.

3.5 Day-to-day delivery and management

The ETAO lifecycle envisages structured management and support once TAs are in post, including regular check-ins with DBE leads, monitoring of workplans and deliverables, and explicit mentoring/skills-transfer activities. NECT is responsible for financial oversight, contract management and quality assurance, while DBE leads provide technical direction and validate outputs.

Day-to-day PM work

On a day-to-day basis, PM roles appear to be the glue in ETAO's model, and far more critical than is apparent at first glance. In both Curriculum Strengthening and MTbBE, PMs sit inside DBE units,

manage multiple TAs (up to eight in 2025 in Curriculum Strengthening), and hold together the web of relationships between DBE officials, NECT and funders. They translate broad project plans into sequenced workplans, assign tasks across different TAs, and are the first line for dealing with delays, scope adjustments and emerging issues.

This managerial role is coupled with a very practical implementation role. PMs (and, where they can secure them, DBE admin staff they have mentored) take on many of the "PA-type" and logistical tasks that make projects possible but do not require TA-level expertise: drafting annual project plans, organising workshops and writers' retreats, liaising with provincial and district offices, booking venues, flights and accommodation, and chasing internal approvals.

"I didn't realise I'd effectively be a 'one-man show' until I arrived – there's no director, no deputy director, no assistant director in the unit, so all the day-to-day management, coordination and problem-solving lands with the PM" – Project Manager

In Curriculum Strengthening, the PM describes having to "wear many hats" in an unfunded mandate—managing up to eight TAs, seeking and structuring external funding, and, until she secured some DBE admin support, personally handling logistics for curriculum writers' workshops. In MTbBE, the PM feels somewhat like "being a one-man show… the only staff member" in the National Language Unit besides the DDG, combining project management, monitoring, provincial school visits, stakeholder convening and representation in high-level DBE forums.

"The department is very happy for me to run with the project as the project manager and simply report back periodically on progress and deliverables" – Project Manager

Because DBE is not staffed for these coordination and operations functions, and hiring is constrained by a long-standing moratorium, PMs effectively substitute for an internal layer of middle management and programme administration that would normally sit between senior officials and specialist experts. They also provide a key interface for TAs, brokering their engagement with other units ("I am the link who is able to say to the TA this meeting meets your expertise") and informally mentoring DBE administrators and interns pulled into project work.

Day-to-day TA work

Technical Assistants do not operate simply as external specialists producing discrete outputs. Their role is more embedded and relational, combining technical delivery with ongoing engagement, problem-solving and adaptation within the realities of DBE processes. Day-to-day work typically includes reviewing and drafting technical documents, tools or frameworks; participating in meetings with DBE officials and stakeholders; refining outputs in response to feedback; and responding to emerging implementation demands. In practice, TAs frequently move between focused technical work and broader coordination or facilitation functions, particularly in under-resourced areas where permanent internal capacity is limited.

The nature of this work differs across streams. In Assessment, TA work is generally more bounded and specialist, focused on assessment design, psychometrics, data interpretation and analytical outputs. In Curriculum Strengthening, the work is more iterative and co-productive, involving cycles of drafting, review, alignment and revision alongside DBE teams. In MTbBE, the role is broader and more system-oriented, extending into stakeholder engagement, readiness work, multilingual system design and implementation planning. Across all streams, TAs are not only providing technical

expertise, but also helping to translate reform intent into workable processes, products and decisions within a complex institutional environment.

Day-to-day TA work almost always exceeds the contracted hours on paper. Many TAs describe routinely working beyond their paid days — for example, travelling for week-long workshops on a five-day-per-month contract, or putting in evening and weekend time on reading, drafting and DBE meetings — while still being required to invoice strictly within contractual limits. This means funders often receive substantially more TA time and expertise than they formally pay for, while also obscuring the true level of effort required to sustain the current portfolio of work.

Project managers occasionally experience minor delays in receiving inputs or deliverables from TAs, but these are not considered significant or detrimental to project progress and are managed through normal project-management processes. Overall, PMs emphasise that their day-to-day challenges relate far more to the scale and complexity of the work than to difficulties in working with TAs, who are consistently described as highly professional and operating at the top of their game.

Day-to-day coordination and working relationships

While formal governance structures and reporting lines exist within the ETAO model, much of the day-to-day functioning of the programme depends on highly relational and responsive working relationships between DBE officials, PMs and TAs. Interviewees consistently described the operational model as relying on continuous communication, rapid troubleshooting and accessible points of contact to keep work progressing within complex and often resource-constrained institutional environments.

In practice, coordination occurs through a combination of formal meetings, working groups, review processes and informal mechanisms such as regular phone calls, WhatsApp communication and ad hoc problem-solving engagements. PMs in particular appear to play a critical connective role between DBE branches, TAs, NECT and external stakeholders, helping to maintain alignment, follow up on actions, resolve bottlenecks and ensure continuity across multiple moving parts.

Several DBE stakeholders specifically highlighted the accessibility and responsiveness of PMs as a key operational strength of the model. As one central DBE manager explained, "the interface between DBE management ... and NECT programme manager, I think [NECT Management], there is that constant communication. It works well because I'm just a phone call away, she's also a phone call away," describing this direct line of communication as an important enabler of effective collaboration.

3.6 Quality assurance and monitoring

The ETAO team has progressively tightened internal oversight, with a two-stage QA process in which DBE leads approve TAs' time sheets and products, and ETAO staff review these against contracts, deliverables and portfolios of evidence before authorising payments. Standardised deliverables templates and quarterly reporting formats have been introduced to make expectations and tracking more explicit, and project managers, where deployed, coordinate day-to-day work and act as extensions

"I think it's good that were having to do the reporting. I feel like some of the processes that... have only been implemented quite recently should have been implemented years ago and Im almost feeling that everything is coming at once at the moment, so its extremely overwhelming." Project Manager

of ETAO within DBE units, particularly in new or under-staffed areas.

Recent interviews nonetheless highlight persistent weaknesses: some DBE supervisors treat approvals as a formality, while NECT carries the burden of justifying expenditure and results to funders, driving an expansion of monthly and quarterly reporting and increasingly granular portfolios of evidence. TAs and PMs experience these processes as administratively heavy and often "tick-box" in nature, with limited visible feedback, even as they strengthen assurance that days worked and outputs delivered can be verified for audit and funder reporting.

Across interviews, the reporting regime was summed up as "more admin, less value": monthly activity reports, quarterly project reports, PM synthesis reports and ad-hoc DBE briefings frequently repeat the same information in different formats, with little differentiation in purpose between monthly and quarterly requirements.

TAs and PMs consistently report that overlapping reporting requirements—monthly, quarterly and DBE-specific—can crowd out higher-value strategic and relational work, reinforcing the case for lighter, tiered reporting regimes and a focus on "minimum viable" outcome data rather than ever-expanding evidence portfolios.

Additional demands—such as uploading interim drafts and marking the specific paragraphs worked on each month—are widely seen as micromanagement, especially given limited capacity within NECT and DBE to read and respond at this level of detail, so many TAs and PMs doubt that reports meaningfully inform decisions about funding, oversight or programme adaptation. Beyond this contract- and output-focused monitoring, there is still limited systematic tracking of skills transfer, institutional uptake of tools or medium-term changes in unit capability, so current M&E remains stronger on activity and output verification than on outcomes and learning.

"I think when you start asking people to upload documents they've been working on and highlight the section they worked on that month, there just isn't the capacity for anyone to check that, and it's maybe not necessary if the final product is satisfactory" – TA

3.7 Exit, skills transfer and institutionalisation

According to ETAO's own guidelines plus the international TA literature and benchmarking we reviewed, good practice is to plan sustainability, skills transfer and exit from the outset. Sustainability and handover should be planned from the outset, with clear strategies for institutionalising TA-generated knowledge, tools and processes within DBE. The desktop review and NECT team interviews consistently identify handover and institutionalisation as a major weakness in the current model.

Knowledge and capabilities often remain concentrated with individual TAs, and high staff turnover within DBE further undermines continuity. Documentation reveals limited evidence of explicit exit plans or structured handover processes, with the partial exception of work on NICPD, where a business case for institutionalisation as a specialised service delivery unit represents a more systemic sustainability effort. NECT team members explicitly identify handover as a 'sore spot' in internal reflections, noting DBE risks dependency on recurring TA for recurring functions without stronger transition planning. The fragility of current arrangements is illustrated starkly by one senior TA's assessment that if NECT were withdrawn, the MTbBE programme would 'flat out collapse', as DBE does not yet have the internal capacity to drive it independently.

While NECT reinforces the importance of skills transfer and sustainability in the TA work culture through its guidelines, materials and meetings, and some departments are showing a more deliberate attempt at documentation, there are important practical and structural factors in the South African context that shape what 'skills transfer' and 'capacitation' can realistically mean in practice.

- In practice, many ETAO deployments operate as long-term 'thinking partnerships' and sources of catalytic expertise, particularly in MTbBE and Curriculum Strengthening, while others – notably some Assessment assignments focused on psychometrics and large-scale data analysis – function more like classic expert product deliveries with limited prospects for DBE to fully internalise those capabilities.
  Across domains, this translates into a spectrum from individual and team-level skills gains (e.g. curriculum writers and assessment officials) to more diffuse system-level shifts in policies, strategies and routines, with both forms emerging but neither yet anchored in fully institutionalised DBE structures.
- Fragile funding and contracting – short horizons, late renewals, changing contract lengths – repeatedly interrupt continuity and make long-term mentoring or deliberate handover hard to plan or honour, even where TAs are willing to invest in it.
- ETAO's own practice shows a gap between system-level capacity gains (new strategies, units, working groups and procedures) and consistent individual skills handover, with reforms often outpacing the creation of stable DBE posts, teams and routines to anchor TA-generated knowledge.

Across all three streams, explicit exit plans, handover protocols and succession arrangements are not yet consistently documented as a standard practice; where they do exist, they are often informal, tailored to specific roles and reliant on individual relationships. Given that many deployments are still in mid-implementation rather than at true exit, interviewees describe handover as something that happens "where applicable" rather than as a formalised lifecycle stage, leaving exit and institutionalisation comparatively less codified than earlier stages of the ETAO process.

Chapter 4: Insights on value creation and impact

This section surfaces emerging signs of value and change associated with ETAO's technical assistance, without claiming to offer a comprehensive impact assessment or to have traced every effect in the system. Instead, it draws out patterns that appear consistently across interviews, reports and process documentation – some expected, such as concrete instances of skills transfer and improved technical products, and others more emergent, such as shifts in discourse, confidence and ways of working inside key units. These are presented as indicative contributions and areas of traction, rather than definitive evidence of overall impact.

4.1 Skills transfer and mentorship

It is important to note that this review did not undertake a dedicated, system-wide evaluation of skills transfer, so the examples highlighted here are indicative rather than exhaustive; other pockets of capacity development may not have surfaced in the available evidence.

Concrete individual and team skills gains

- In Curriculum Strengthening, the TA mentioned training and mentoring of two junior curriculum consultants and large cohorts of curriculum writers (over 240 participants across in-person and online trainings in Q1 alone) has built a small but real cadre more able to handle complex curriculum reform and large-scale writer management.
- In Assessment, a DBE manager states in a report that officials have learned advanced data analysis and interpretation methods by working alongside TAs on TIMSS, SEACMEQ and systemic evaluation, to the point where teams can now independently analyse large datasets, even if they still rely on TAs for complex study design and psychometric modelling.

Knowledge management and procedural know-how

- In Curriculum Strengthening the TA's role includes deliberate knowledge management – capturing the research base, process lessons and documentation from the curriculum review – so that DBE has a reference point and emerging playbook for future cycles, which is a form of skills transfer into organisational memory rather than only individuals.
- In MTbBE, TAs and the PM have run workshops and ME capacity-building sessions for officials and provincial actors, transferring practical know-how on multilingual materials, terminology processes and monitoring frameworks, even though these competencies remain thinly spread and dependent on a small group of champions.

IMPLICATIONS FOR SKILLS TRANSFER MEASUREMENT

This is also a sober reflection of the wider South African education context, which funders need to factor into their expectations. An informed reading of the ETAO model and way of working, together with a realistic understanding of DBE's structural and fiscal constraints, implies that external partners should be cautious about driving ever-more granular "evidence of skills transfer" requirements or expanding reporting lists, when the core bottleneck is the absence of funded posts and stable units to absorb that capacity.

4.2 Two-way and peer learning effects

Peer learning within the TA/PM cohort – Curriculum TA describes how specialist TAs (e.g. on assessment and teacher development) came in for specific deliverables, "shared it with the team," and then other TAs carried the work forward, implying mutual strengthening inside the expert team, not just DBE learning.

Academic strengthening through implementation exposure – The MTbBE TA explains that being embedded in DBE exposed him, as an academic, to the political and implementation realities of rolling out bilingual education, and that he has taken these grounded insights back into his university teaching and research.

Shaping academic teaching with an understanding of implementation realities

4.3 Evidence of system-level effects

While ETAO's model is explicitly designed to strengthen system capacity and support policy reform, many of the most significant effects occur at system level and are not easily captured through predefined indicators. These include shifts in policy direction, coordination across units, and changes in how key issues are understood and acted on. The evidence reviewed for this study demonstrates that these effects are already emerging in practice.

- **Influencing national policy signals**

The MTbBE stream offers a vivid example of how TA work can shift national policy signals and system practice. Drawing on his longstanding research, the senior language TA led a National Rapid Assessment in 2023, travelling to all nine provinces at a moment when DBE felt it had "reached a dead end" after investing heavily in generic reading programmes without sufficient gains. His report, which foregrounded the neglected "language question" in reading, went directly to the Minister and DG and catalysed a national conference on mother tongue-based bilingual education; this in turn informed the establishment of a National Language Unit and the appointment of a special DDG to lead the MTbBE agenda.

From there, he translated the assessment into a concrete incremental MTbBE model and implementation plan, proposing a progression from roughly 80–20 African language/English in the early grades to a 50–50 split by Grade 7, embedded in the new National Reading Strategy (2024–2030). The combination of evidence, technical advice and political advocacy has helped secure repeated SONA references to MTbBE and a dedicated Cabinet memorandum on the strategy, signalling that language is now a high-level system priority rather than a niche technical concern.

As a first visible system shift, Grade 4 learners wrote bilingual maths and science assessments for the first time in South Africa's history in 2023, with a phased rollout planned through 2025, which the TA describes as "the real big impact" of his advisory role.

- **NECT's intermediary role within the system**

NECT has played a bridging role that the DBE cannot easily perform internally, enabling reforms that would likely not have progressed at the same pace or scale without this support. By holding a system-wide view across initiatives, NECT has been able to identify overlaps, connect actors, and direct technical expertise to priority areas in a way that complements DBE's existing structures. This

role has been particularly important in a context where the DBE lacks the resources and mechanisms to recruit and manage specialised expertise directly. DBE managers and technical leads noted that without this function, key initiatives—particularly in Curriculum Strengthening and MTbBE—would likely have stalled or remained fragmented.

- **Shifts in how key issues are understood and prioritised**

In the MTbBE stream, the technical assistance has contributed to a clear shift in how language and reading are understood within the system. Rather than introducing isolated techniques, the work has reframed the "language question" as central to learning outcomes and to the design of early-grade reforms. This is visible in national-level developments, including the establishment of the National Language Unit and the integration of MTbBE into national strategy processes. These shifts were not framed as formal outputs at the outset, yet they represent substantive system change with potential to outlast the current funding cycle.

- **Strengthening coordination across fragmented parts of the system**

ETAO-supported processes have created working relationships across units that do not typically collaborate closely (for example Curriculum, Assessment, Language, Teacher Development). Working groups, joint processes, and shared deliverables have created new spaces for alignment around complex reforms that cut across these units. These relationships are repeatedly described by DBE managers as necessary for moving difficult reforms forward and are likely to be drawn on for future initiatives. The coordination function is therefore a key part of the TA's added value, rather than an incidental by-product.

- **Emerging use of implementation-oriented approaches**

Across streams, there is growing evidence of more deliberate attention to implementation and delivery. This includes the use of readiness assessments, phased rollout models, and closer alignment of monitoring processes with DBE planning and reporting systems. These approaches are beginning to shape how reforms are designed and executed, even where they were not explicitly defined as TA deliverables. Over time, this shift towards implementation-oriented thinking can increase the likelihood that policy and curriculum changes translate into classroom-level change.

- **More realistic understanding of what system reform requires**

Finally, the experience of working within funding and contracting constraints has led to a clearer, shared understanding of what is required for system-level change. Stakeholders highlighted that short-term or fragmented funding undermines the ability to complete reform cycles and to consolidate learning from one phase into the next. While this remains a constraint, it has clarified the minimum conditions needed for success—such as longer time horizons, continuity of expertise, and flexible funding that can respond to system realities. These insights provide a concrete basis for funders and the ETAO to shape future investment strategies and partnership models.

Chapter 5: Synthesis and implications for the ETAO model

5.1 Interpreting the ETAO model

5.1.1 Design logic and structural tensions

ETAO responds to a structural condition within the DBE: complex, technically demanding reforms are being pursued within an institutional environment that does not consistently have the specialised capacity or project architecture to deliver them.

The model addresses this by introducing high-level, embedded technical expertise through an external mechanism, allowing access to skills and flexibility that are difficult to achieve within standard public sector structures.

However, the evidence across Chapters 3 and 4 shows that the model operates within two consistent tensions that shape how it performs in practice.

Tension 1: Flexibility vs institutionalisation

The model's external positioning and flexible contracting enable rapid access to high-level expertise but make it harder to embed that expertise into durable systems, roles, and routines within DBE. As a result, capability is often built through individuals and relationships, rather than consistently institutionalised.

Tension 2: Technical momentum vs system readiness

Technical work—particularly at policy and design level—often progresses faster than the system's ability to implement it. While ETAO enables strong conceptual and strategic development, implementation depends on funding flows, administrative processes, and provincial capacity that are not always aligned to the same timelines.

5.1.2 Variation in how the model operates across streams

A further insight from the analysis is that ETAO does not operate as a single, uniform model across streams. Instead, different domains reflect different modes of technical assistance, depending on the nature of the work and the level of the system they engage.

In Assessment, technical assistance is more bounded and implementation-oriented. Work is focused on defined outputs—such as large-scale assessments and analytical reports—and on building organisational capability through structured collaboration. This aligns with implementation-focused TA models, where the primary contribution lies in specialist expertise and disciplined delivery.

Curriculum Strengthening sits closer to a co-design and change facilitation model. Work is more iterative and relational, involving joint development of tools, processes and capacity (e.g. curriculum writing, knowledge management). However, this model is not fully realised, as funding structures at times pull the work toward more bounded delivery.

MTbBE operates at a more explicitly system level. It combines long-term system design (e.g. language policy, implementation frameworks) with agenda-setting, coalition-building and advocacy

across multiple actors. This reflects a hybrid model that spans both system "architecture" and system "catalysis," where influence extends beyond formal outputs into how issues are framed and prioritised.

5.2 Where the model is most developed in practice

The evidence across Chapters 3 and 4 shows that the ETAO model is most developed in its upstream and system-facing functions—particularly in shaping policy, strengthening coordination, and translating reform intent into technically robust frameworks and tools. These are areas where the model's design—embedded expertise, flexibility, and cross-system positioning—aligns well with the nature of the work required.

5.2.1 Strong contribution at policy and system design level

Across all three streams, ETAO plays a central role in translating broad reform mandates into concrete strategies, frameworks, and implementation approaches. This is most visible in MTbBE, where technical assistance has supported the establishment of the National Language Unit, the development of a multi-pillar implementation strategy, and the design of an M&E framework aligned to DBE planning systems. In Curriculum Strengthening, ETAO has supported the development of a structured curriculum-review architecture, standards-aligned writing processes, and associated assessment and teacher development frameworks. In Assessment, the focus has been on producing high-quality analytical outputs and strengthening DBE's ability to interpret large-scale assessment data.

These contributions reflect a consistent strength of the model: the ability to operate at the interface between policy intent and technical design, where specialised expertise is required to translate reform ambition into implementable approaches.

5.2.2 Strength in coordination and coalition-building

A second area where the model is clearly functioning is in building and sustaining working relationships across different parts of the system. Across streams, ETAO-supported processes have created spaces for engagement that did not previously exist or were not functioning effectively.

In MTbBE, the Reference Group has brought together DBE units, statutory bodies, provincial officials, and academic partners into regular structured engagement. In Curriculum Strengthening, cross-branch working groups and national roadshows have enabled substantive interaction between Curriculum, Assessment, Teacher Development, and Rural Education units.

These coordination functions are consistently described by stakeholders as essential to moving complex reforms forward. They are not incidental to delivery; they are a core part of how the model adds value, particularly in a system where mandates are distributed across multiple actors and levels.

5.2.3 Structured planning, approval and technical delivery processes

The model is also relatively well developed in its upstream operational stages. Planning and approval processes generally function as intended, with DBE driving needs identification and ETAO acting as a technical and funding filter. Annual planning cycles align TA requests with APP priorities, and layered approval processes ensure basic strategic alignment before recruitment proceeds.

Selection and contracting mechanisms—standardised templates, defined rate bands, and shared terms of reference—are widely seen as a relative strength and have improved over time. These processes provide a stable backbone for the model and enable consistent mobilisation of technical expertise across streams.

5.2.4 Evidence of adaptive practice within streams

There is evidence of adaptation within individual streams in response to implementation realities. However, these adaptations are occurring primarily at the level of programme practice, rather than as systematic changes to the ETAO model itself.

In MTbBE, for example, implementation challenges—particularly variation in provincial readiness—led to the introduction of readiness assessments, strengthened coordination structures, and more explicit implementation processes. These changes reflect a shift in how the work is approached within the stream, incorporating implementation conditions more directly into planning.

In Curriculum Strengthening, more informal adaptations—such as "idealistic planning" to manage funding volatility—have allowed the stream to maintain coherence despite shifting constraints.

While these examples demonstrate responsiveness to context, they are largely driven by individual PMs and TAs, and are not yet systematically captured or translated into model-wide practices. As a result, learning remains uneven across streams, and adaptation is not yet an embedded feature of the model itself.

5.2.5 Emerging feedback loops between implementation and design

There are also early signs of feedback loops between implementation experience and programme design, although these are not yet consistent across all streams. In MTbBE, provincial readiness assessments and engagement processes have fed directly into national-level planning, surfacing gaps in teacher preparation and resource availability.

In other streams, feedback mechanisms exist but are more uneven and often internal to TA and PM teams rather than systematically embedded in DBE planning processes. This suggests that while the model can support adaptive learning, these feedback loops are not yet fully institutionalised.

5.3 Where the model is less developed or constrained

While ETAO is clearly effective in upstream and system-facing functions, the evidence also shows that its performance is less consistent in areas that depend on sustained institutional embedding and system-wide implementation. These patterns are not isolated weaknesses, but reflect the structural tensions outlined in Section 5.1 and the broader conditions within which the model operates.

5.3.1 Limited reach into sub-national implementation structures

The model is strongest at national and branch level, where TAs and PMs work directly within DBE units to shape policy, frameworks, and implementation approaches. However, its reach into provincial and district structures is more uneven.

MTbBE provides the most developed example of sub-national engagement, through provincial readiness assessments and roadshows, which have created visibility into implementation conditions across provinces. But even here, a TA notes that provincial implementation remains the critical and

least-resourced challenge, with Grade 5 terminology for maths, science and technology still outstanding as the school term begins.

Across streams, district-level engagement remains limited, and provincial reach is not yet systematic.

This reflects a broader constraint: while the model is well positioned to support design and coordination at national level, implementation depends on system conditions—resourcing, administrative processes, and provincial capacity—that are not consistently aligned or directly within the model's control.

5.3.2 Institutionalisation and capacity development are uneven and context-dependent

Across all three streams, the transition from TA-supported work to sustained internal capability remains inconsistent. Exit and handover processes are rarely formalised, and where they exist, they are often informal and dependent on individual relationships. The extent to which capability is retained depends heavily on DBE system conditions, including staffing continuity, organisational structures, and the ability to absorb new roles and ways of working.

A further nuance is that "capacity" is not a single, uniform concept across ETAO's work. In highly specialised domains—such as psychometrics, multilingual system design, or advanced curriculum architecture—the expectation of direct skills transfer to DBE officials within short timeframes is not always realistic, as these functions rely on deep expertise that is not easily replicated.

In other areas, capacity relates less to individual skills and more to how the system functions—coordination across units, implementation processes, and the ability to manage complex reforms—which requires organisational change and longer time horizons. By contrast, more practical capacities—such as data analysis, curriculum writing, and use of tools—are more readily transferable, and it is in these areas that the clearest gains are visible. Taken together, this helps explain why institutionalisation and capacity development appear uneven.

A further constraint is DBE's structural and attitudinal readiness to absorb what TAs are building. In MTbBE, one senior TA assesses that if NECT were withdrawn the programme would "flat out collapse", while a pattern across streams of treating national reforms as pilots or experiments rather than committed programmes further limits the institutional investment that sustained capacity building requires.

5.3.3 Feedback loops are present but not consistently embedded

There is evidence of feedback from implementation into design, particularly in MTbBE, where readiness assessments and stakeholder engagement have informed adjustments to national-level planning. However, across streams, these feedback loops are uneven and often depend on the initiative of individual PMs or TAs.

In some cases, feedback remains internal to project teams and is not systematically integrated into DBE planning cycles or decision-making structures. This limits the extent to which implementation experience consistently shapes programme design across the system.

A further constraint is that TAs across streams have limited visibility of each other's work, suggesting NECT's cross-domain coordinating role is not yet consistently operationalised at TA level

5.3.4 Role expectations extend beyond the formal mode

Across all streams, PMs and senior TAs are operating beyond their formally defined roles. In addition to technical delivery, they are taking on functions such as fundraising, cross-branch coordination, stakeholder management, and elements of system leadership.

A related process observation is that TAs and PMs frequently absorb informal advocacy functions that go beyond their contracted roles – working to build buy-in and alignment across DBE units, statutory bodies and provincial actors that is necessary for reforms to move but is not formally recognised or resourced as part of the TA deployment. This reflects a broader pattern in which the model depends on individual effort and relational work to compensate for uneven institutional commitment across the system.

While this reflects the adaptability and commitment of individuals, it also points to an implicit expansion of the model that is not formally recognised or resourced. As a result, important functions are being performed, but in ways that depend heavily on individual capacity and relationships rather than being structurally embedded.

5.4 Conditions shaping performance

The patterns described above are shaped by a consistent set of conditions that influence how the ETAO model operates in practice. These conditions do not determine outcomes on their own, but they help explain why the model performs differently across contexts and stages of the lifecycle.

- **Continuity and quality of embedded expertise**

Across all three streams, the quality and continuity of senior TAs emerge as a central factor in the model's effectiveness. TAs with long-standing relationships with DBE bring contextual understanding, credibility, and the ability to navigate complex institutional dynamics. Where this continuity is present, work is more likely to progress beyond outputs toward system-level influence.

- **Relational and coordinating roles within the model**

Project Managers and NECT play a critical role in holding together the operational, relational, and strategic dimensions of the work. Their ability to coordinate across actors, manage funder relationships, and sustain momentum is consistently identified as essential. However, these roles are often broader than formally defined, with key coordination and system-integration functions relying on individual effort rather than being structurally embedded.

- **Time horizons and funding structures**

A persistent condition shaping the model is the mismatch between short-term funding cycles and the longer time horizons required for system-level reform. Fragmented contracts and funding volatility affect continuity, limit the ability to plan over multiple phases, and create uncertainty around implementation and institutionalisation. These constraints are particularly visible in areas requiring sustained engagement, such as capacity development and system integration.

- **DBE system conditions and absorptive capacity**

The extent to which ETAO-supported work translates into sustained system change is strongly influenced by DBE system conditions. High staff turnover, shifting organisational structures, and limited

internal capacity affect the system's ability to absorb, retain, and build on technical inputs. As a result, even high-quality work may not consistently translate into durable institutional capability.

Where internal buy-in is uneven or institutional commitment is fragile, TAs and PMs find themselves building alignment and advocacy from the ground up, absorbing functions that ideally would be driven from within DBE itself

- **Clarity and consistency of the model itself**

Finally, the absence of a simple, shared articulation of the ETAO model means that role expectations, deployment decisions, and reporting approaches are often shaped on a case-by-case basis. This creates flexibility, but also places pressure on individual PMs and TAs to interpret and hold the model in practice, contributing to variation across streams.

5.5 Cross-cutting tensions shaping the model

These conditions translate into a set of structural tensions that shape how the model operates in practice. The analysis across Sections 5.1 to 5.4 points to a set of recurring tensions that shape how the model operates in practice. These tensions do not represent isolated issues, but structural features of how ETAO functions within its current context. They are summarised below:

Tension	How it shows up	What it means
Flexibility vs institutionalisation	Capacity sits with individuals; weak exit	Capability is uneven and hard to sustain
Technical momentum vs system readiness	Strong design; uneven implementation	Progress slows at implementation stage
Reactive vs proactive deployment	TA driven by requests	Limited system-level prioritisation
Standardisation vs contextualisation	Uniform tools vs varied provincial conditions	Fit to context is inconsistent

ETAO is functioning well in its core areas – policy design, coalition-building and technical delivery – and its contributions across streams are significant. The main gaps are structural rather than personal: short contracts, funding volatility, weak exit practice and an implicit model that places too much pressure on individual PMs and TAs. These are practical, addressable problems, and the four recommendations in Chapter 6 are designed to respond to these structural tensions within realistic constraints

Chapter 6: Conclusions and Recommendations

This chapter brings together what the evaluation found about ETAO's model and what should happen next. As the distinction between ETAO's processes and ETAO's model makes clear, the two are related but serve different purposes.

This evaluation finds that ETAO's operational processes are strong and have matured significantly over time. A discernible change logic — reflected in how different forms of technical assistance are matched to particular reform domains, institutional conditions and implementation horizons — is visible across the programme, particularly in more established streams. However, while many elements of this logic are embedded in practice, governance processes and operational decision-making, they are not always consolidated into a single explicitly articulated model shared consistently across stakeholders. As a result, expectations regarding roles, contract durations, pathways to institutionalisation and definitions of success are still, at times, negotiated adaptively at stream or project level rather than guided by a uniformly interpreted framework.

The four design moves proposed in this chapter are designed to address that gap practically, building on what already works rather than redesigning what does not need to change.

6.1 Conclusions

6.1.1 Three Core Findings

1. ETAO has established a clear and functioning process for managing technical assistance, but the underlying model of change remains only partially articulated.

    - *What works:* The six-stage lifecycle, revised guidelines, and domain-specific assessment frameworks have brought discipline to TA requests, approvals, recruitment, contracting, and management.

    - *What's missing:* Documentation is largely silent on deeper design questions:
        - How ETAO positions itself on the TA spectrum (engineer, architect, catalyst),
        - Which PM/TA configurations suit different reform types and time horizons,
        - Minimum durations required for various change pathways, and
        - How capacity development and institutionalisation unfold over time.

2. In its strongest domains, ETAO already operates as a hybrid model that combines system design, coalition-building, and delivery of concrete outputs. However, this way of working is not yet formally defined or consistently understood. Practice cases (MTbBE, Curriculum Strengthening, Assessment) reveal a coherent working logic:

    - Embed a strategic PM plus high-end TAs inside priority reforms,
    - Co-construct strategy/ToC, tools, implementation plans, monitoring frameworks,
    - Use embedded teams to bridge DBE branches, statutory bodies, and partners,
    - Run implementation experiments (pilots, readiness assessments, roadshows), and
    - Lock in gains through policy decisions, APP/AOP indicators, and unit strengthening.

    Gap: This pattern is held in narratives and practice, not in a simple, shared articulation of the ETAO model.

3. In the absence of an explicit model, expectations are shaped by branch demands and funder constraints rather than a shared design**.** This contributes to stretched roles, inconsistent expectations, and uneven approaches to capacity development and exit. High staff turnover within DBE further limits continuity, meaning that even well-executed technical assistance does not always translate into durable institutional capability.

Taken together, these findings show ETAO operating within a wider implementation system — linking DBE strategy, funder expectations, technical assistance, and delivery — but with key elements of that system still implicit rather than clearly defined.

6.1.2 What the findings mean for ETAO's model

ETAO has established a credible and well-functioning set of processes for managing technical assistance, particularly in upstream design and coordination functions. What is less developed is the underlying model — the shared change logic that guides which types of technical assistance are deployed for which reforms, over what time horizons, and toward what outcomes.

Its ability to generate sustained system-level change is further shaped by structural factors that sit partly outside ETAO's control: short funding horizons, variability in DBE absorptive capacity, and high staff turnover within key reform units. These conditions mean that even high-quality technical support does not automatically translate into durable institutional capacity, and that the model must be designed with these realities in mind rather than against an assumption of stable conditions.

The central issue is therefore not whether the processes work, but whether they are guided by a clearly enough articulated model to translate high-quality technical support into durable system capacity consistently. Addressing this gap requires greater clarity on how different TA and PM role types are deployed, how capacity development and institutionalisation are expected to unfold over time, and what conditions are necessary for those pathways to hold.

6.1.3 Practical implications under current constraints

As documented in Sections 5.3 and 5.4, three practical issues stand out from the process evidence:

- **First,** roles are consistently stretched beyond what the model formally defines. Project Managers are holding together strategy, coordination and fundraising, while senior TAs are expected to combine thought leadership with delivery. This creates risks of burnout, blurred accountability and hidden subsidy of work.
- **Second,** administrative and M&E requirements are widely experienced as heavy, with limited focus on whether DBE capability is actually improving. This meets funder requirements, but pulls time away from core technical and relational work.
- **Third,** without a simple, shared articulation of the model, role mix, duration and reporting decisions are shaped case by case by branch requests and funder preferences — making it difficult to hold consistent expectations, protect core functions, or plan for institutionalisation over time.

6.2 Practical recommendations: strengthening the ETAO model

ETAO is working well in its core areas. The main gaps are structural: short contracts, funding volatility, weak exit practice and an implicit model placing too much pressure on individuals. These are addressable. ETAO also operates within constraints that are not of its own making — limited DBE hiring capacity, reliance on time-bound funding, high staff turnover, and cautious funder environments. The design moves below focus on how to strengthen the model within these realities, rather than assuming ideal conditions.

6.2.1 Clarify role types and time horizons for different reform needs

Purpose: Ensure that roles, expectations, and durations are aligned with the nature of the reform being supported.

Key shifts:

- Define a small set of ETAO role types (e.g. system PM, project PM, strategic TA, delivery TA), with clear functions and scope.
- Link each role type to indicative time horizons (e.g. longer-term roles for complex system reforms; shorter-term roles for bounded delivery). This could even include more full-time capacity over the period.
- Set realistic spans of control for system PMs to reduce over-concentration of responsibility.

Boundary conditions:

- Avoid treating all PMs and TAs as interchangeable resources.
- Avoid assigning short-term contracts to roles expected to support multi-year reform processes.

Implementation notes:

- Use existing cases (MTbBE, Curriculum Strengthening, Assessment) as concrete templates when drafting archetypes, rather than designing from scratch.
- Socialise the archetypes with DBE and key funders so they become shared reference points, not only internal NECT tools.

6.2.2 Make capacity and exit pathways explicit at unit level

Purpose: Move capacity-building and handover from informal intention to a simple, regular practice, tailored to different TA role types.

Key shifts:

- Introduce a short, co-developed capacity and exit note for each major deployment, especially for system PM and strategic TA roles, specifying:
    - which DBE roles or units are expected to take over which functions,
    - 2–3 capability milestones and the main mechanisms to reach them (for example, co-working, shadowing, coaching), and
    - a simple transition sequence (high support → shadowing → light touch).
- Use lighter, fit-for-purpose capacity/exit prompts for shorter-term delivery TA roles (for example, documenting handover products, key contacts and routines) rather than a full note in every case.

- Draw on international examples (such as VVOB-style "change projects") that use concise, living capacity/exit plans rather than heavy frameworks.

Boundary conditions:

- Do not assume that training sessions or co-working alone will automatically institutionalise capacity; experience shows this is rarely the case without explicit planning.
- Do not apply the same exit expectations to highly specialised knowledge roles (for example, reading science, linguistics) as to more procedural functions; some functions will need on-going external expertise.
- Identify which functions are currently absorbed informally by TAs and PMs, and plan explicitly for how these transfer to DBE over time.

Implementation notes:

- Keep the note to 1–2 pages and integrate it into existing planning and reporting cycles so it does not become another standalone template.
- Use the note as a reference point in renewal or rotation discussions with DBE and funders to guide decisions on when and how to adjust TA intensity.

6.2.3 Differentiate admin and M&E regimes by role and purpose

Purpose: Reduce low-value reporting and strengthen attention to a small set of outcome signals.

Key shifts:

- Establish tiered reporting regimes aligned with the role archetypes:
    - *Strategic TAs and system PMs:* concise narrative-plus-indicator reports centred on outcome and learning questions (for example, early institutionalisation signals, coalition shifts), with space to describe relational and design work.
    - *Delivery TAs:* more structured, output-focused templates for products, training and implementation milestones.
- Adopt a small, ETAO-wide set of implementation-oriented outcomes (acceptability, feasibility, fidelity, early sustainability) and a few simple institutionalisation markers, and align existing tools to these.
- Rationalise existing QA and reporting tools so each has a clear purpose (financial control, contractual QA, learning), and remove or simplify elements that stakeholders and NECT agree are not used.

Boundary conditions:

- Avoid requiring strategic TAs and system PMs to complete the same volume and granularity of evidence as high-volume delivery roles.
- Avoid treating every possible indicator as mandatory; benchmarking and local experience suggest that a small, focused set of indicators is more realistic and useful in constrained settings.

Implementation notes:

- Pilot the tiered approach in one or two streams (for example, MTbBE and Curriculum) before scaling, and use TA and PM feedback to refine templates.
- Agree in advance with funders which outcome signals will be prioritised, to avoid indicator creep after the fact.

6.2.4 Negotiate architecture-linked non-negotiables with funders

Purpose: Align funding arrangements and reporting demands with the basic conditions the model needs to succeed.

Key shifts:

- Translate the elements above into a short ETAO operating note, co-owned by DBE and NECT, that sets out:
    - ETAO's hybrid positioning (engineer + architect + catalyst),
    - role archetypes and typical time horizons, and
    - a small set of non-negotiables (for example, minimum durations for system PMs, a modest learning/M&E budget, realistic expectations for highly specialised roles).
- Use international examples (for instance, architect-style programmes that insist on minimum engagement periods or protected learning lines) to illustrate that these conditions are standard rather than idiosyncratic.
- Invite key funders to co-sign or formally acknowledge the operating note, so that it becomes a shared reference for managing expectations and risk.

Boundary conditions:

- Avoid accepting funding arrangements that systematically undercut the model's own minimum conditions without explicitly recording and communicating the risks to DBE and funders.
- Avoid allowing reporting demands to expand indefinitely without linking them to clear decisions or learning uses; this has already led to perceptions of tick-box compliance among TAs and PMs.

Implementation notes:

- Frame non-negotiables as a shared risk-management tool ("what is needed to give this investment a fair chance of success") rather than as a wish-list.
- Where possible, co-sign the operating note with DBE so that it is clear these conditions are there to protect DBE's reform agenda, not only NECT's comfort.

Taken together, these design moves aim to strengthen an already functioning model by making its core logic more explicit, aligning roles and time horizons with the realities of reform, and ensuring that technical assistance contributes more consistently to sustained system capacity.

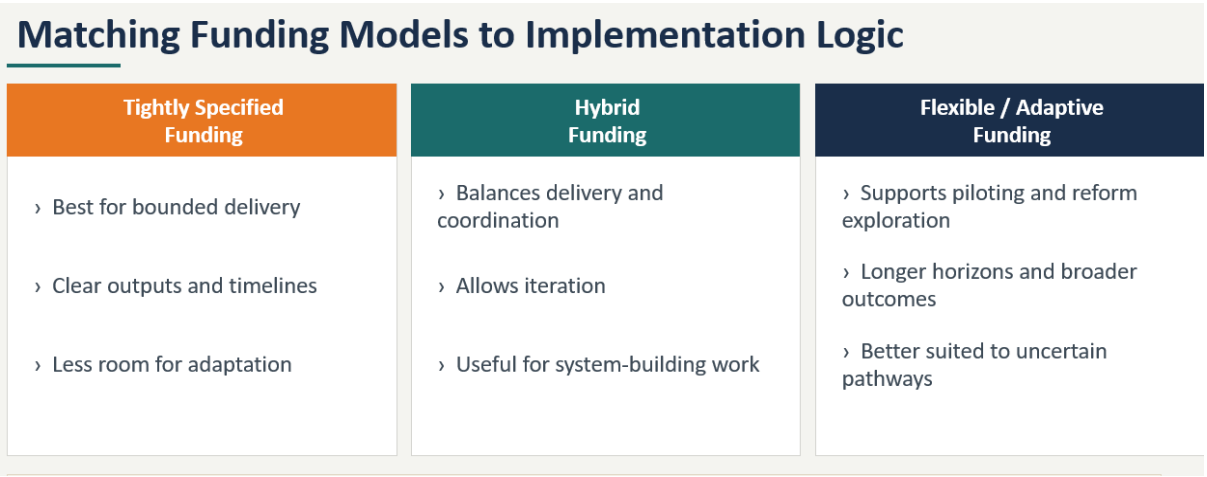
6.3 Implications for funders

The findings also have implications for funders supporting embedded technical assistance. In particular:

- Align contract durations with the time horizons of reforms being supported,
- Provide modest, flexible funding for coordination, M&E and learning functions,
- Recognise different forms of capacity (technical, relational, system-level),
- Avoid uniform reporting requirements across all TA roles, and
- Support explicit exit and transition planning.

Different kinds of funding are suited to different kinds of work, and that ETAO (and DBE) should try to match the funding model to the reform logic, rather than treating all grants the same.

- **Tightly specified funding** works best for bounded pieces of work with clear products and timelines, such as a once-off study, toolkit or short pilot, but it leaves little room to adapt if circumstances or priorities shift.
- **Hybrid funding** mixes some earmarked, output-linked money with a degree of flexible budget, so that teams can both deliver agreed products and adjust activities as they learn; this is particularly useful for system-building work where coordination and iteration matter.
- **Flexible/adaptive funding** is designed for piloting, exploration and complex reforms, providing longer time horizons and broader outcome space so that programmes can adjust course in response to evidence and politics, which is crucial in uncertain or emergent reform pathways like MTbBE or curriculum systems strengthening.





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