



Vision 2028

Forging a new path for
our social movement

Acknowledgements

With thanks to EE members, staff, special advisors, members of National Council, staff alumni and the hard work of everyone who contributed to chart a journey to EE's Vision 2028.

Appreciation to Bertha Retreat at Boschendal for the space to think.

Special thanks and gratitude to The Raith Foundation.

Introduction	4
A refreshed EE Theory of Change	4
Vision	6
Mission	6
Values	6
Strategic goals	7
Towards objective setting	9
Strategic objective statements	10
Monitoring and evaluation	11
EE Movement Enablers	12
Finance and Fundraising	12
Communications	13
Operations and organisational culture	13
Circling back to the beginning	13
Vision 2028	15
Appendix 1: Principles for a Safe and Welcoming Work Environment	16
Appendix 2: Values-based practices for organisational change	18
Appendix 3: EE's path to Vision 2028	19

Introduction

Any collective of individuals - like a social movement - requires a strategy to map out its high-level goals and objectives. As part of that, vision, mission and values play an important role. For Equal Education (EE) Vision 2028, EE put together a widely collaborative and consultative process with key stakeholders, foremost members, to gather insights into the direction EE should take. EE Vision 2028 works on a 5-year horizon, 2023-2028.

Vision 2028 considered a range of factors to inform the process - key victories, remaining challenges, campaigns, members' ability to experience material change in their activism, how to inject fresh energy, what to leave behind in the spirit of strategy being as much about what you decide to do as what you decide not to do. Finite resources and movement wellness are critical in informing focus. It also considered the Charter for an Equal Education to be launched at Congress. The Charter encapsulates the principles that ought to underpin the education system - principles that progressive society all over South Africa can organise around. The Charter is a document which spells out our vision for an equal education system: one that will afford all children with the same opportunities. The Charter has been drawn up through widespread discussion and debate. It draws on our history and on research, and arises out of the direct experience of ordinary people.

EE Vision 2028 refreshed the Theory of Change (ToC) to be more simplified while retaining the key aspects of the original version - reflection and revision as part of ongoing adaptability being essential to any strategy. The strategy engagement process also considered a high-level approach to developing a monitoring and evaluation (M&E) strategy. As core organisational enablers, Fundraising, Finance, Communications and Organisational Culture underpin Vision 2028.

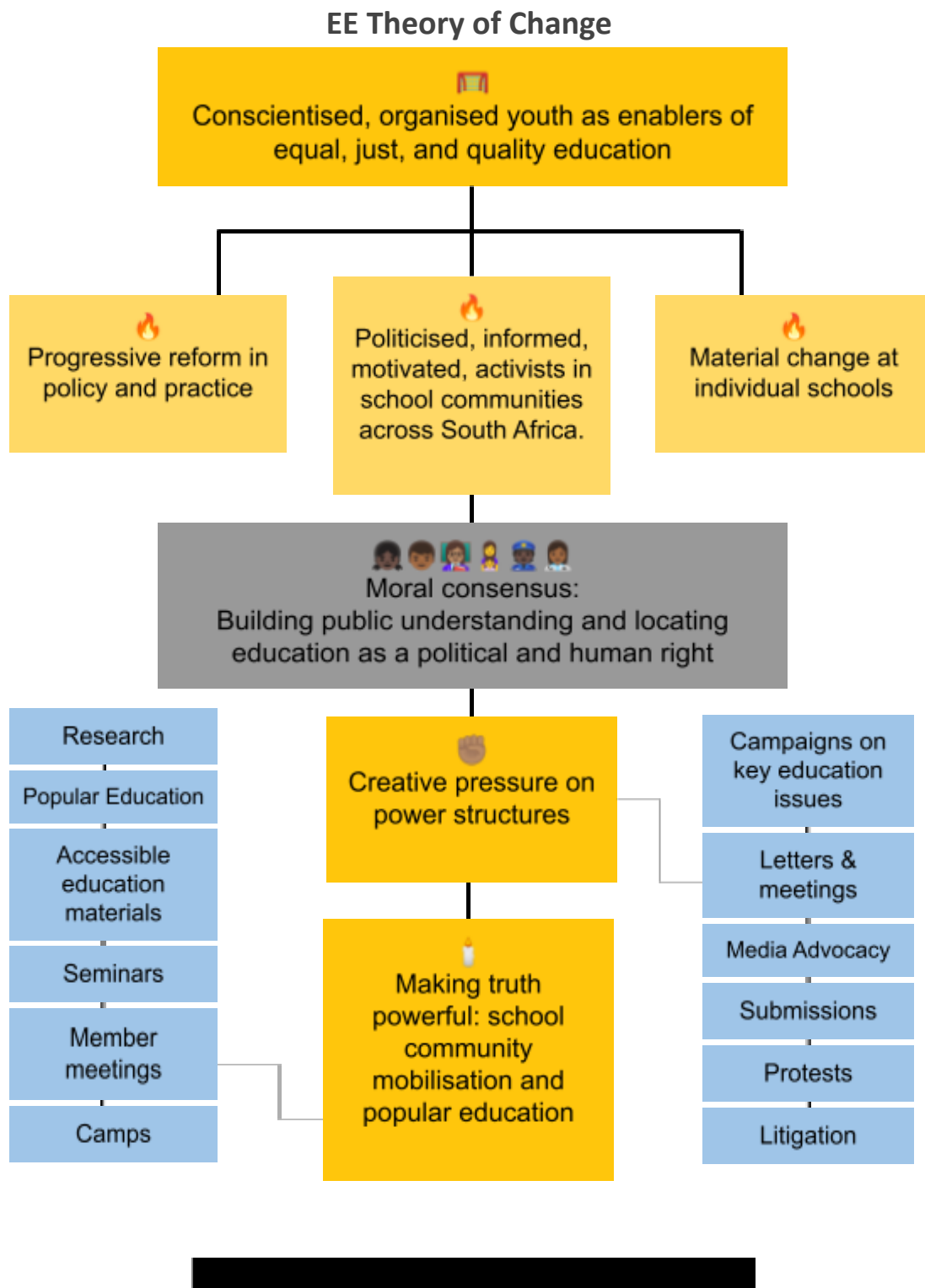
A refreshed EE Theory of Change

A ToC underpins the rationale for any collective's existence in that it seeks to explain what change you want to make in the world. It is the how and why of how any expected change will happen in a particular context. Besides needing a refresh since it was originally written, it was also important to ensure that current staff members and leadership engage with and buy into the key thinking captured in the ToC.

The 'elevator pitch' is important and a must-have, not only when engaging potential supporters. EE's members, staff, National Council and any other stakeholders must speak from a communal language of understanding to make its activism and organising more effective and impactful.

When planning and day-to-day operations gets tough, a ToC provides a touchstone - an essential reminder- to answer why you're doing what you're doing.

The refreshed EE ToC's desired overarching goal is **to develop conscientised, organised youth as enablers of equal, just, and quality education. To do this, EE works towards progressive reforms in policy and practice, material change at individuals schools, and politicised, informed, motivated, activists in school communities across South Africa.**



EE works to develop **conscientised, organised youth** as enablers of **equal, just, and quality education**. To do so, EE works for **progressive reforms** in policy and practice, **material change** at individual schools, and **politicised, informed, motivated, activists** in school communities across South Africa.

Vision

To be *the* political home for young people who want to change education in society.

Mission

We are a youth-led mass democratic movement of learners, post-school youth, parents, teachers and community members who use mobilisation and public action, supported by careful research, to empower young activists and ensure equality in South African education.

Values

The values which EE's members strive to live by, are captured in the movement's Constitution. These values remain critical for the social movement and guide the advocacy of EE members.

EE Constitutional Values

Act with honesty and integrity in everything we do.	Be people of action and commitment who lead by example.	Engage in lifelong learning.	Respect and develop schools and educational institutions.
Struggle for social equality locally and globally, particularly in education.	Trust and support each other, and work cooperatively.	Hold our leaders and ourselves accountable.	Use the resources of the movement with care.
Lead social transformation, especially in education, through analysis, evidence and peaceful activism.			
Defend human rights, and work to eliminate direct and indirect discrimination and inequality based on race, gender, sex, pregnancy, marital status, ethnic or social origin, colour, sexual orientation, age, disability, religion, conscience, belief, culture, language, birth, health or any other status.			

EE grounds its activist organising model in these crucial values that speak clearly to the human dignity of those around us and ourselves as we strive to achieve our Vision.

Vision 2028 seeks, in addition to these values, to **add** fresh, flexible¹, adaptable, dynamic organisational values to inject positive change, building a thriving and healthy organisational culture. The movement must never become (just) an organisation, but the reality of EE staff and structure cannot be ignored. Indeed, that staff are not governed by a set of

¹ in that they do not need Constitutional amendments

organisational values, collaboratively built, means EE misses some things - like 'getting the basics right'.

In a survey with staff and deliberation on that feedback, these values - with specific meaning defined for an EE context - were proposed as additions. These align with EE's Constitutional values. It also speaks to where the movement is now compared to where it was when the Constitution was passed.²



EE champions of change will model these behaviours, define what they mean inside EE, creating a groundswell, for staff to work to greater effectiveness. There is growing awareness that staff activists face fatigue and a sense of running a marathon everyday. This is not sustainable, and the values proposed here, together with the Constitutional set of Principles together with a set of Practices collaboratively built by staff, will begin to help transform the way EE does its organising work. Reviewing EE's current practices and ways of working, collaboratively and deliberately working to co-create new ways, ensuring they align with the values identified is a key priority as part of the Vision 2028.

The ToC, Vision, Mission and Values, together with EE Principles and Practices, informs the why, what and how of what the social movement wishes to achieve. While they are key elements, they do not yet convey the path - what steps EE will take to reach its strategic goals for the next five years.

Strategic goals

Experts in protest and social movements describe the method "of deciding the strategies and tactics of a social movement as an interrelated cyclical process that has to be taken into account

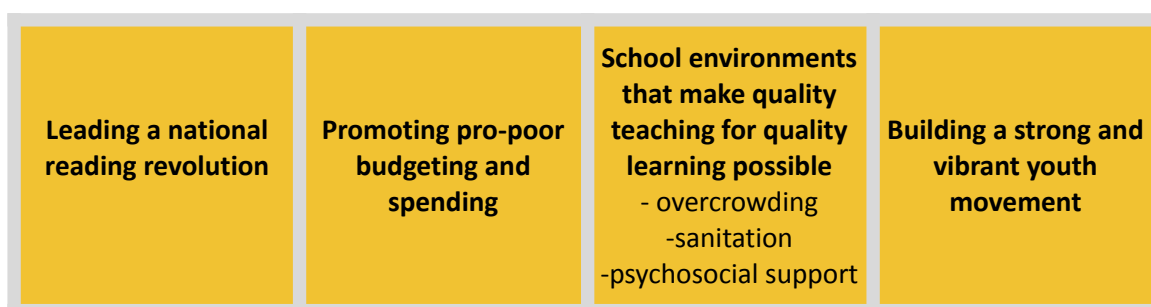
² As a strategic driver, it is advisable that values are refreshed periodically, as people and goals change and shift.

³ Ways and means for how to do this inside EE needs to be actively built, modelled and lived. It won't happen automatically.

before the movement takes any actions because each action has a different impact on the multiple audiences, Meyer (2007)”⁴ who defines a strategy as “a combination of a claim (or demand), a tactic, and a site (venue).”

This cyclical process informed the discussions and debates on what EE’s strategic goals should be for the next five years. It was a key question posed to EE members and stakeholders like NC, staff alumni and advisory board members. The major drivers identified was that EE should refocus, consider the material effects for learners and schools as they engage in activism, leave some things behind (choosing what not to do to give yourself an advantage), and consider introducing a new campaign.

EE will focus on four strategic goals, 2023-2028



Leading a national reading revolution

“People cannot be active or informed citizens unless they can read. Reading is a prerequisite for almost all cultural social activities”⁵. A culture of reading creates curiosity, a deep love of books and exploring written works beyond what’s prescribed at school. A culture of reading is not the only path to activism, but a love of reading built up by books expanding the mind revolutionises how we think about the world around us. The schools in which EE works have a significant need to develop a culture of reading, seeing improved libraries or even just posters on why books and reading matter. The EE reading revolution will inject a new energy, something tangible and meaningful, something everyone can participate in, and give material benefits to participants, as activists. EE is not entering a pedagogical reading space. What it is doing is promoting the love of the written word in and for youth activism.

Promoting pro-poor budgeting and spending

For years the world and South Africa have been faced with governments implementing austerity policies, ostensibly to reduce national debt and ensure a tighter fiscus. What happens in reality is these policies are anti-poor, thus by definition anti-black (in SA’s race inequality landscape) and leaves people more impoverished, living on the margins of society. As activists, especially young people demanding recognition, justice and quality of life and learning, it is important for EE members to understand the way budgeting and spending works so that demands at varying sites of struggle can be heard, cogent and demonstrative of a deep understanding. EE also recognises that the realisation of basic rights in South Africa, including the right to education, is directly dependent on adequate pro-poor State funding towards these rights.

⁴ [Politics of Protest](#)

⁵ <https://files.eric.ed.gov/fulltext/ED496343.pdf>

School environments that make quality teaching for quality learning possible.

Since EE's inception in 2008, the social movement has been campaigning for the government to fix schools. In 2013, EE's advocacy culminated in a historic victory, with Basic Education Minister Angie Motshekga signing the Minimum Uniform Norms and Standards for Public School Infrastructure into law. Since then, ensuring the implementation of the Minimum Uniform Norms and Standards for Public School Infrastructure has been a driving focus. After more than a decade of this campaign, EE's strategic planning process affirmed that infrastructure remains a key issue affecting learners' daily learning experience, that EE continues to be a leading voice in ensuring government accountability, but also that there is some need to consolidate and refresh the focus of the campaign over the next five years.

EE's Vision 2028 will see the social movement focus on the key systemic levers that enable faster and more efficient infrastructure delivery (funding, accountability, data and planning, and regulatory frameworks), while also ensuring material improvements in specific schools EE is organised in, specifically addressing overcrowding and sanitation. At the same time, EE wants to expand its work on ensuring conducive learning environments, by ensuring that in addition to safe and proper infrastructure, schools are also caring environments where learners can access the psychosocial support they need.

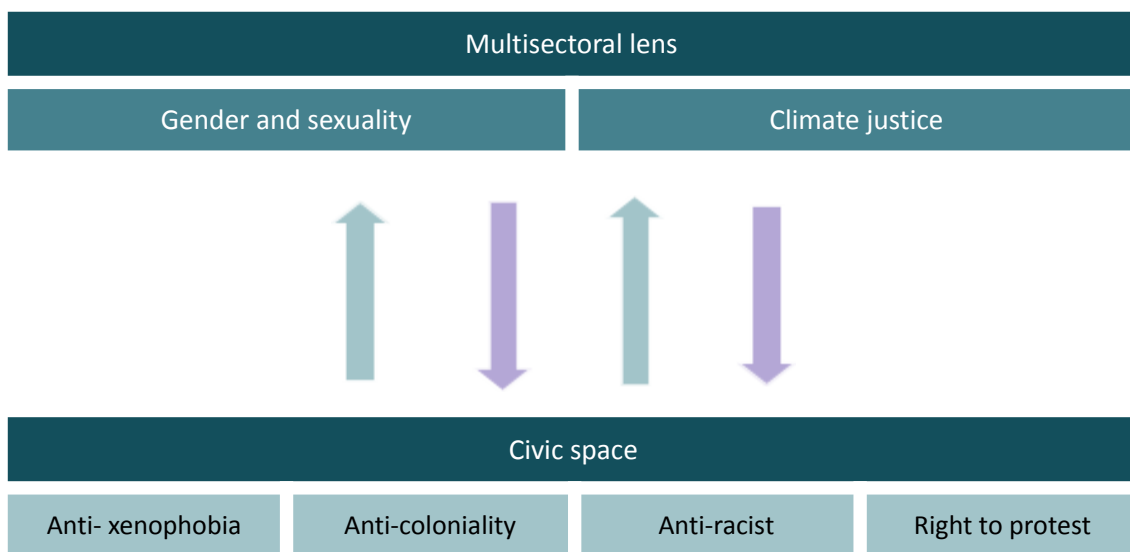
Building a strong and vibrant youth movement

The pandemic, its effects on a social movement that relies on interpersonal relationships and communication, and the rotational school timetable system, amongst others, has impacted EE's organising and activism over the last two years. While the pandemic brought with it tremendous challenges, it also reaffirmed the crucial role EE has to play as a place where young people can come together to engage on key issues affecting society. With the arrival of vaccinations and some restrictions being lifted, EE's members have demonstrated increased interest. A number of learners and schools have been directly impacted by the pandemic. EE's strategic goal is to #BuildTheMovement in a considered manner - matching the membership it can attain with the resources it has to support them. A key aspect of a strong and vibrant youth movement is to strengthen the governance structures and constantly review the current organising model, among others.

Towards objective setting

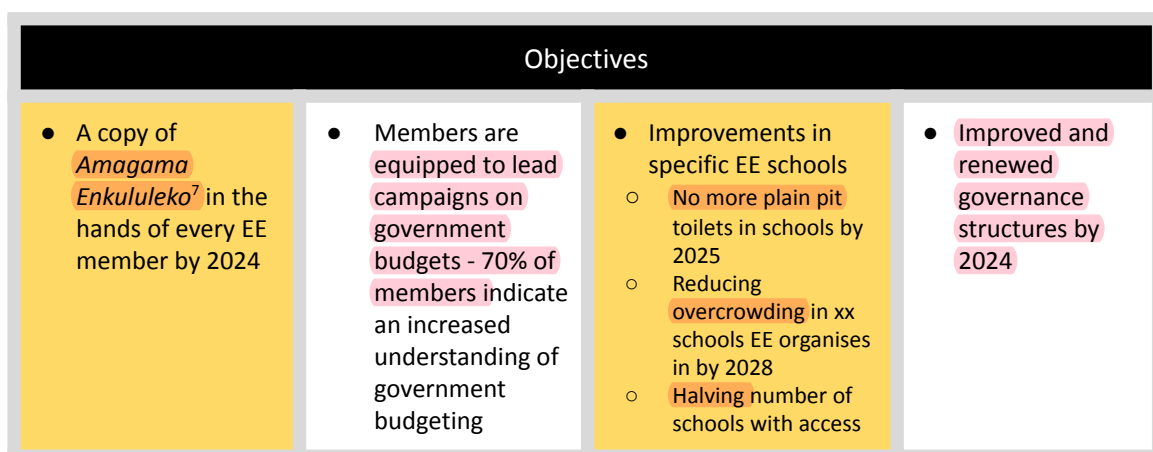
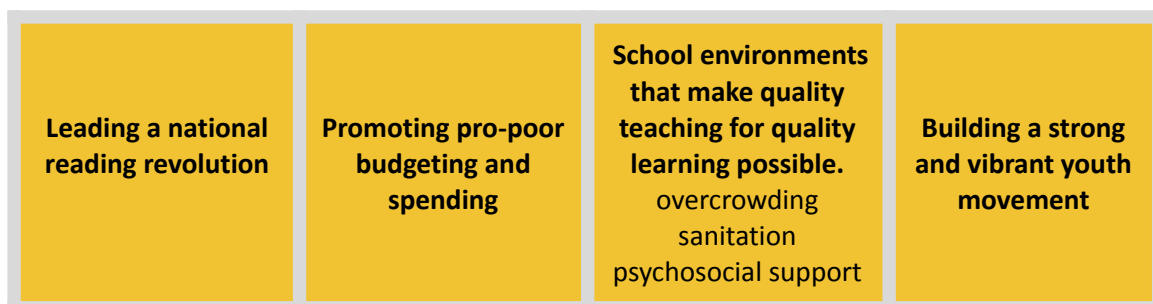
The next building block to any strategy is to decide on the flesh that makes up each strategic goal - the objective statements underlying each broad goal.

Before doing that, however, EE's Vision 2028 identifies and notes the multisectoral lens it must bring to bear on all its work, together with the civic space in which the social movement operates. EE's Vision 2028, seeks to ensure an explicit climate justice and gender justice lense to all campaign work, while also continuing to act in solidarity with key issues affecting society such as xenophobia and racism.



Strategic objective statements

The key objectives underlying each goal are important for EE to be clear on, to drive the social movement work toward that goal but also to act as a benchmark in reviews and annual planning. It fleshes out the detail of what the strategic goal entails and tries to include specificity, measurability, relevance, time-bound and achievable statements.⁶



⁶ In some instances the SMART detail is not yet complete. However, it must be noted that this way of strategic planning and development is new for EE. Everything should be considered as 'one step at a time' so that perfection is not the enemy of progress.

⁷ This is a collection of short stories, poems and other works published by Equal Education for young activists.

		to unreliable water supply	
Pilot reading groups in our school communities in each province by 2023	Equitable budget allocations to education increases at least by inflation	- Policy and systems that ensure - Accountability for contractors - Adequate regulatory frameworks - Enough money for school infrastructure - Accessible and accurate data and coordinated planning	A more streamlined organising model by 2023/24
An achievable and relevant plan by 2024 to promote a reading culture	Lead and amplify calls for an end to austerity, increased year on year to 2028	- Respond to calls for psychosocial support in schools by solidifying emerging demands of members by 2023 - Develop accessible core curricula on psychosocial support for use in organising by 2023	Active and engaged EE alumni and volunteers by 2025
Contribute a progressive activist voice to key national reading discussions	Efficient and effective government expenditure and reducing wasteful expenditure		A youth leadership programme inside EE and beyond by 2023
	Support calls for UBIG		Lead and participate in regional and global progressive youth movements

Monitoring and evaluation

To ensure strategic goals and objectives of Vision 2028 are achieved, EE has set out to develop an M&E strategy for the social movement. This is a first for EE. As a result, the strategy for M&E will be contained, achievable, simple, accessible and consider that the movement does not have the resources in finance nor human resources to dedicate a full-fledged outfit to M&E.

The goal is to establish a usable M&E system for tracking progress and demonstrating results in organising, activism, advocacy, for greater EE impact. The result objective will have a qualitative and quantitative lens. Monitoring tools like surveys, monitoring forms, registers and focus

groups will be used as relevant. These indicators will be used to build narrative impact reports for the movement to review in quality assurance, but also to key stakeholders like donors. In the longer term EE will work toward a digital platform (like Salesforce for NGOs) to house and access data.

Effective M&E strategy is integrated into the annual planning process, which EE will adopt more rigorously. M&E will always indicate lessons to be learned. In addition, EE as an organisation and social movement is committed to celebrating victories and wins via outputs, outcomes and impact.

M&E objectives:

- Improve the quality and capacity of the routine data collection systems;
- Outline specific activities required for strengthening the organisational capacity to conduct effective M&E;
- Ensure greater usage of routine data sources; and
- Strengthen the monitoring culture within EE by promoting its importance.

The expected key outputs of the M&E Strategy are:

- Prepare an M&E action plan for short- and medium-term;
- A functional, simple but comprehensive M&E system - this isn't software (for now), its process;
- Implementation progress reports are produced on time.

Expected outcomes:

- Promoting the practice of evidence-based decision-making, policy development and advocacy in EE;
- Objective decision-making for performance improvement; planning and resource allocation; and
- Promoting accountability inside EE.

The results path, from objectives to outputs to outcomes through to the M&E strategy is aligned with the values of EE the social movement and organisation.

EE Movement Enablers

Any collective or organisation requires organisational drivers, or enablers, to help facilitate its vision. EE as a social movement is no different. The critical enablers of the financial landscape, Communications and Advocacy, and Operations and organisational culture are framed in how they will each contribute to achieving 2028.

Finance and Fundraising

EE's approach for the past five years has been to stabilise its budget and consolidate its work rather than aggressively expand, and this is currently the plan for the foreseeable future. Key goals in support of Vision 2028 include diversifying donors, bringing on new multi-year donors, leveraging EE's endowment to build an alternative income stream and strengthening our systems for reporting to and communicating with donors. EE is also looking at expanding its fundraising networks, through establishing "Friends of EE" entities abroad, who can fundraise internationally on EE's behalf.

Following the closure of EE's Face to Face Fundraising Department, EE wants to, over the next period, explore other ways of building our existing individual donor base and signing members of the public up to give regular donations. This includes developing targeted messaging and content to encourage public donations; hosting partner forums for prospective donors, friends and partners of EE to learn more about our work; and personally reaching out to individuals to request donations.

The shifting funding landscape in South Africa and internationally remains a crucial factor that will impact on the implementation of Vision 2028.

Communications

Communications, as always, will shift and adjust to the needs of EE. The objectives of the Communications Department in support of EE's 2028 vision are to amplify the voices and experiences of EE members; to support community engagement, education and mobilisation; to create awareness, interest and involvement in EE's work; building public understanding of education inequality and to build pressure on the relevant powers, especially government. This is done through the creation of popular education, and through leveraging traditional and social media (which also means equipping some staff and members to engage these media). EE's Communications and Fundraising staff must also work closely together on communications aimed directly at institutional and individual donors. New tools and tactics will be considered where affordable and feasible. EE's digital platforms are critical for public learning and their understanding of the work of the social movement.

Operations and organisational culture

The values and practices needed to make EE Vision 2028 successful will inform the method and shape of organisational culture change in the organisation that staffs the movement. EE will once again foreground its Constitutional Principles. In addition, it will co-develop with staff a set of core practices based on shared values. There is a critical need for organisational culture change - in pace of work, in how decisions are made, in interpersonal relationships, in accountability - in all the ways that make organisation more effective.

Intentional discussions on decision-making throughout the organisation and movement for greater fluidity and adaptability are needed. This will deepen collaboration and ensure EE has the necessary direction to chart a course to realising Vision 2028.

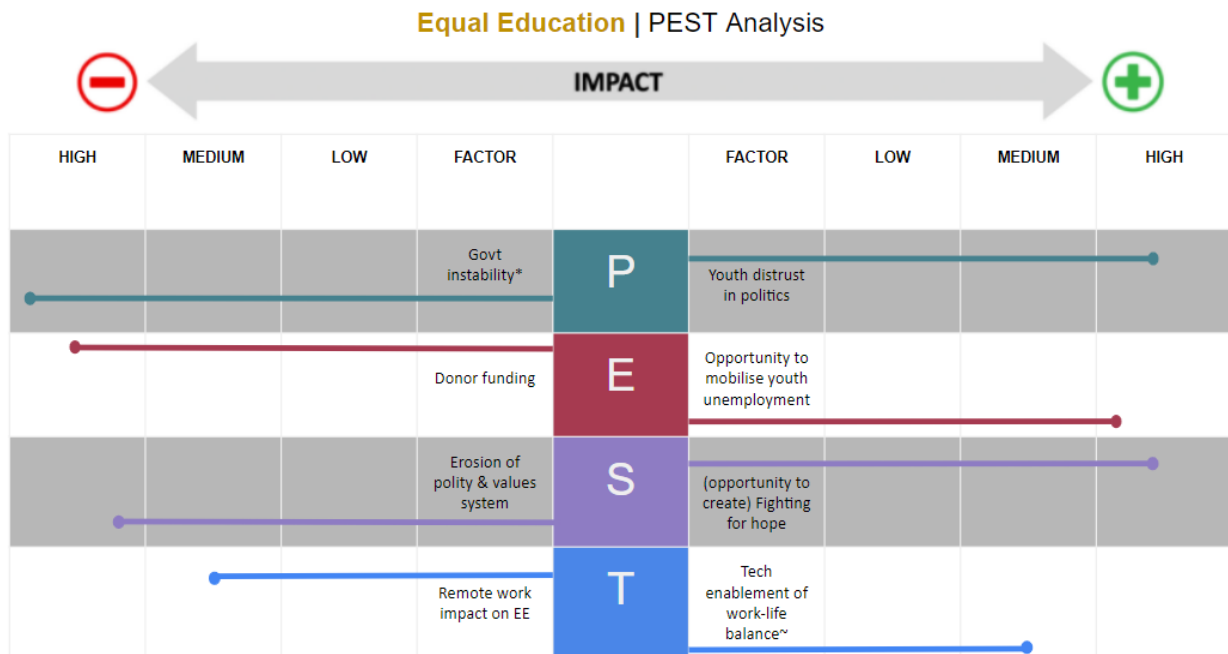
The individual, team, department and organisation gets a cultural 'ways of working' reset based on a clear, deliberation plan of action to drive change. Culture might be a default, but changing it doesn't just happen. There is no magic bullet here - it takes creative collaboration while getting the very basics right to form collective buy-in, driven by the General Secretary in modelling a leadership culture of dynamism, can-do, being willing to try, being responsive and getting things done - all because the learner is at the centre of the social movement.

Circling back to the beginning

At the start of the EE Strategy Development project the team undertook a PEST (Political, Environment, Social, Technology) analysis of the environment. Instead of the traditional SWOT, and because EE has a good understanding of its position in the SA civil society sector - as SWOTs are conducted annually in planning for the year ahead. In documenting this strategy here in Vision 2028: Forging a new journey for our social movement, we made the deliberate decision to not start with showing the PEST at the beginning of this document. The reason is simple but profound - as the EE team went through the grounded-methodology project

approach done in phases, we reflected at the end of the hard, robust sessions of discussion and debate around focus, to see to what extent we responded to our own PEST analysis.

In pivoting to new campaigns, in refreshing and focusing infrastructure objectives, in creating a culture of reading we are assured we are responding to the youth factor via creating hope, adding a counterbalance to the erosion of polity and South Africa's civil society values system. A key gap remains funding for in-organisation technology requirements. Nevertheless, EE is assured that Vision 2028 is an effectively planned strategy for this environment.



*government instability can also be a positive factor for EE to capitalise on

~Tech can become all encompassing and thus a negative factor -avoid "always on" culture

Vision 2028



Appendix 1: Principles for a Safe and Welcoming Work Environment

These principles are the product of a collective reflection process. The intention is to protect everyone in the organisation, especially those who are often marginalised, by preventing unwelcome/non-collegial behaviour. They aim to create an environment that enables growth, is inclusive and safe for all who pass through the organisation.

Intentional Equity

1. Make equality in all forms (including gender, sexuality, ability, race, ethnicity, class, preferred language, age, education level, etc) an integral part of our curriculum and work practices (amongst staff, facilitators, Equalisers and all members of EE)
2. Celebrate difference and different ways of being. Do not deny or minimise the different identities and lived experiences of EE members, instead promote unity across lines of difference.
3. Commit to continuous learning and reflection, from and with each other.
4. Disrupt negative gender based stereotypes when you see them in individual or broad scale interaction or in the delegation of tasks.
4. Call out rape culture in all its forms – misogynistic comments or behaviour which signal unwelcome sexual overtures.

Communication

5. Treat each other with dignity and respect by listening to and acknowledging each other. Recognise that everyone's feelings are valid even if you disagree with what is being said.
6. Intentionally make space for voices that aren't usually heard by being conscious of one's own positionality (the power one holds in spaces and the way it informs one's viewpoint). Including affirming the authority of individuals to speak on their work/area of knowledge
7. When an issue arises, we commit to proactively and constructively confronting them to avoid repeated incidents and making people feel disempowered in the space. We commit to protecting those who are affected by said incidences.

Collegial relations

8. Managers and SMT should create a safe space for staff to regularly give and receive critical feedback. This feedback should leave all members of staff feeling supported and cared for in an effort to promote a healthy work environment.
9. Acknowledge that we are all heavily committed to EE's work.
 - a. Value and participate in all of the different sectors of EE's work. Try to understand and respect people's work and workload.
 - b. Foster a culture of being open and sensitive about what can be achieved within reasonable means. Respecting people's time in and outside of work hours.
 - c. When a colleague expresses concern about their workload, working environment, or another aspect of their work – assume the best intentions of them.
 - d. Teamwork is important, for growth of all parties involved

10. Create organisational policy to require internal democracy and ensure that all policy aligns with our principles, including implementing it equally and consistently for everybody
 - a. Make transparent and direct channels for staff to report issues anytime
 - b. Treat matters with sensitivity and in confidence
 - c. Ensure there is an individual within each office who is trained in dealing with the sensitive nature of sexual harassment to provide support
11. All SMT members to attend and participate fully in all types of training in order to ensure a collective learning experience and demonstrate commitment to the importance of the process

Training and Development

12. Provide staff with differentiated tools and training so that they can successfully respond to challenges in their work.
 - a. Specifically ensure that those in leadership positions are provided with appropriate management skills
 - b. When an experienced person works with others, they should be proactive about communicating and sharing their skills and knowledge with those less familiar
 - c. When designing organisational training programmes, create opportunities for [junior staff/staff from different departments] to participate in the process for their growth and to promote inclusivity

Appendix 2: Values-based practices for organisational change

1. Be responsible for managing your inbox and communication. Respond within 16 hours (2 working days) and no more than 24 hours (3 working days) for an external email.
2. Figure out ways to manage inboxes. Share trips and tricks. A golden rule: file and label everything and keep your inbox such that you can see the earliest email on your screen without scrolling down. Use email settings like the snooze button, etc, to help manage your workflow.
3. Slack or WhatsApp - commit and make the decision. Introduce a tool and communicate expectations around using that too.
4. Do minutes on time. Consider having office managers take minutes at management meetings. Management members cannot participate fully in meetings when they are tasked with minutes. Confidentiality should be ensured by the contract of employment.
5. Manage meetings more effectively and efficiently.
 - a. The Chair must play a pivotal role in deciding what actually goes on an agenda- not just collecting all submitted topics.
 - b. The Chair must allocate time to each agenda item and consider what issues could be resolved via email
 - c. When no movement is apparent in a meeting, the Chair and participants should consider alternatives and move forward.
 - d. Stick to allotted time until the practice of finishing on time becomes part of the DNA.
 - e. Consider alternatives to wellbeing check ins or even the frequency of them. Significant portions of time gets used in a meeting where there are 15 participants.
 - f. Send minutes to relevant stakeholders, especially NC, on time. Ensure a quality check has been done.
6. Hold yourself accountable in everything you do - remember, EE stewards donor funds for the benefit of learners and schools. Wasted time or not showing up is akin to corruption.
7. If you don't know, ask how. There is no shame in learning. In fact, it is encouraged
8. Rest and Recuperation is revolutionary: Staff feeling comfortable to take leave when needed and departments to set out leave gaps and spaces for reflection in their work plan.
9. to be elaborated on inside EE

Appendix 3: EE's path to Vision 2028

The approach EE took to craft, collaborate on and co-create Vision 2028 was one of engagement with members, the Office of the General Secretary, the Senior Management Team, Management and all staff. A grounded methodology approach, to gather input prior to kick-off was used to gather information with a view to see where that methodology would lead the facilitated process. Consultations with members were done by EE staff.

Broad consultation ensured that strategic development was aligned with the values of EE as a social movement. A project plan was developed and shared with the OGS, who played a key role in milestones being met. A presentation was made to all EE staff to inform and consult on the process.

Background organisational documents were reviewed and consulted. New research on social movement development and approach was considered, sharing it with the leadership team. These should be further discussed inside EE, and with members as well.

Once the review phase was completed, research was conducted via focus groups, a staff survey and 1-1 interviews with a variety of stakeholder grouping. The facilitator ensured that interviewees were guaranteed anonymity. Secondary research took place on an ongoing basis. Eight interviews were conducted, about 3 member groups (there were logistical difficulties in some provinces) and 50% of staff completed the survey.

Once all information was collected, survey analysis was conducted for quantitative-based questions, while content and thematic harvesting was done on the qualitative input gathered in the focus groups, interviews as well as the survey.

This 'info harvesting results' was presented to management - with key themes emerging from the grounded methodology approach. To note, to use this approach is not to follow where the path leads. It is indeed organic, but not to the extent that sensible strategic development frameworks and tools are discarded.

A Strategic Development Core Group - formed toward the start of the process - retreated to a breakaway over 2 days. The sessions were engaging, productive and innovative. The use of a Core Group, rather than a 'task team' was intentional - it was not for a few to have the task of developing strategy, but for a core team to lead it.