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BATLAGAE TRUST WM
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NARRATIVE AND FINANCIAL REPORT
TO THE NORWEGIAN MINISTRY OF FOREIGN AFFAIRS
FROM THE BATLAGAE TRUST
12 NOVEMBER 1993

1. INTRODUCTION:

This report is the second progress report from the Batlagae Trust to the Norwegian Ministry of Foreign Affairs (NMFA) in 1993. It is submitted as a supplementary document to the financial and narrative report forwarded to NMFA on 28 May this year.

As stipulated by NMFA, this report takes into account any revised or updated project plans that have taken place since the submission of the last report, details the implementation of the Trust's programmes from July to November, documents all remaining activities and anticipated time frames, and includes projections into 1994 and 1995.

The report accounts for the expenditure of the following funds received from NMFA:

A. Balance from 1992 allocation
carried over into 1993 R 747,504.00
, 1993 allocation received in
two installments:

--:7 April 1993 R 794,392.04

-- 23 July 1993 R 770,791.26,
R1,565,183.30%%

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%3 Please note that at a consultation on 31 December 1992, the 1993 allocation from NMFA to the Batlagae Trust was set at R1,500,000. This amount was therefore reflected as such in the Introduction of our report submitted on 28 May 1993. However, because this money was received in two installments as shown above, and because of the fluctuating exchange rates at the time that the installments were received, the actual total amount received from NMFA in 1993 stands at R1,565,183.30. The Batlagae
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Trustees: Michael Corkc (Chairman) John Samuel. Barbara Watson. William Scрили and Neil M
cGurk Executive Director: Mohammcd Tikly

Trust therefore received an additional and unexpected R65,183.30 due to the fluctuations in the exchange rate.

2. REVISED/UPDATED PROJECT AND PROGRAMME PLANS:

The first revision that The Trust wishes to draw attention to is our receipt of an additional amount of R65,183.30 over and above the agreed 1993 allocation of R1,500,000 due to fluctuations in the exchange rate that worked out in our favour. This surplus amount has been allocated to be utilised by the Archives Project.

Please note also that the balance of funds carried over from the 1992 allocation in the amount of R747,504 have been allocated for expenditure by the bursary programme. This was not explicitly stated in the report of 28 May 1993.

3. ALLOCATION OF FUNDS:

The revised/updated budget for the utilisation of funding from NMFA in the amount of R2,312,687.30 is as follows:

- a. Bursary Programme - R1,154,000.00
 - R 747,504.00
 - . R1,901,504.00
 - b. Support Teachers Programme R 40,000.00
 - c. Yeoville Community School R 35,000.00
 - d. Yeoville Educational Polyclinic R 60,000.00
 - e. Archives Project - R 61,000.00
 - R 65,183.30
 - R 126,188.30
 - f. Administration R 150,000.00
- T O T A L R2,312,687.80

4. EXPENDITURE OF FUNDS TO DATE AND ' IMPLEMENTATION OF PROGRAMMES FROM JULY TO DECEMBER 1993:

4.1 BURSARY PROGRAMME:

Since July 1993, the Batlagae Trust has continued to implement smoothly its extensive bursary programme on a national scale. The total number of beneficiaries at all levels of study now stands at 4 470.

In spite of the bursary assistance that they receive from the Batlagae Trust, many returnees continue to suffer exceptional hardships, especially in the light of the closure of the NCCR offices earlier this year. The NCCR used to provide invaluable welfare support to returnees, for example food, clothing and transport allowances. Now that returnees can no longer rely on this source for assistance, many have come to the Batlagae Trust for help because there are no other organisations that provide this kind of support. In response to this crisis, the Trustees have established a discretionary fund to assist those returnees in extreme need. To date the Batlagae Trust has been able to provide a number of supplementary allocations (over and above bursary support) on a discretionary basis to those returnees in extremely difficult social circumstances.

The closure of the NCCR in April has also affected the Batlagae Trust. Before the dissolution of the NCCR, the Batlagae Trust worked quite closely with that organisation, particularly with regard to utilising the NCCR's regional offices to make sure that the bursary and welfare programmes were implemented on a national scale. The Trust no longer has access to these regional offices, and increasingly has had to rely on the support of other bursary agencies across the country. Also, Batlagae Trust staff have had to travel to different parts of the country far more frequently than when they could rely on the co-operation of NCCR personnel, which in addition to the establishment of the discretionary fund, has placed an added strain on our limited funding. Expenditure to date of Norwegian funding on the bursary programme amounts to R1,254,368.27 as follows:

- a. Pre-school and primary students R 259,097.32
 - b. Secondary students R 191,387.59
 - c. Vocational/technical students R 226,699.52
 - d. Tertiary students R 577,183.84
- T O T A L R1,254,368.27

At the time of writing this report there is a balance of R647,135.73 outstanding on the funds allocated from NMFA to the Batlagae Trust bursary programme. The reason for this rather large balance is two-fold:

a. the balance from the 1992 NMFA funding was allocated to the bursary programme in 1993, giving the Trust a larger sum to disburse than originally anticipated, and

b. more significantly, the Batlagae Trust received an unexpected donation of R700 000 from the South African Council of Churches (SACC) in the second half of the year. This contribution was given with the sole condition that it had to be spent by 31 December 1993. The Batlagae Trust was therefore forced to make adjustments with regard to 'iusbursements to the bursary programme in favour of the SACC.

It is expected that a portion of the balance of R647,135.73 will still be utilised before the end of the financial year. It is proposed, however, that whatever figure is outstanding at 31 December 1993, be re-allocated across wall of the Trust's programmes for expenditure in 1994. The Batlagae Trust sincerely hopes that this decision will meet with NMFAts understanding and approval;

Please be advised that when we submit our 1993 annual general report towards the end of the first quarter in 1994, which also includes audited financial statements, we will also provide the Norwegian Foreign Ministry with a detailed list of scholars and students that it has sponsored in 1993, as well as a distribution by gender and region.

In the meantime, I have attached a more detailed financial breakdown with regard to the allocation of funds to each level of study, which can be found appendixd to this document.

.4.2 SUEPORT TEAQHERS PROGRAMME:

This programme remains an invaluable initiative of the Batlagae Trust. Politically related violence in Venda andlnore particularly in Natal over the past months, has placed both returnee and local school children under incredible psychological strain. Harassment and intimidation of individuals is rife, and many students live in a state of perpetual fear. Combined with impoverished social circumstances, as well the trauma and instability associated with the repatriation process, the majority of returnee students require the psychological counselling services of professionals trained in this area, in order to cope. Many returnees also bring with them a legacy of interrupted schooling from their days of exile. They are often behind in the curriculum and have not acquired the necessary conceptual and cognitive skills to do well in many subjects at school. This coupled with the fact that many have had their schooling disrupted over the past months by teacher stayaways and student boycotts,- most returnees, and in many instances, most local children also require the help of a remedial teacher to assist them to make up educational

deficits. '

The support teachers at Liivah School in Venda and Phambili High School in Durban are therefore providing an excellent service in the form of much-needed psychological and academic support to both returnee students and local children requiring counselling and remedial assistance. This assessment was confirmed in early October when a monitoring visit was made to both schools. We received written reports on each teachers performance and copies have already been submitted to Norwegian Peoples Aid.

Expenditure to date on the Support Teachers Programme is as budgeted, viz R40,000.

4.3 YEOVILLE COMMUNITY SCHOOL:

Much to the gratification of the Batlagae Trust, the first year of the Yeoville Community school has progressed well, and it is clear that the expertise and commitment of the principal and staff are recognised by the community at large. The school has been inundated with requests from local parents about admission for their children, and is therefore more than adequately meeting its stated aim of catering for both returnee and local children. A permanent Board of Governors has been established and the Batlagae Trust is represented on this body. Such has been the demand for additional classes, it was decided to create another two grade one classes, and an additional Std one, Std two and Std four class in 1994. There is no doubt that the success of the Yeoville Community School in combining social and academic support to returnee and local children, will dictate that the school will serve as a model to be replicated in ilker cities across the country. The education crisis in South Africa 0 tinues. A schooling milieu conducive to learning has been lost and urgently needs to be replaced by a national'education system of quality, that will ensure that every child has the same learning opportunities to develop their talents. Small pilot projects like that of the Yeoville Community School will prove of tremendous value in months to come as these issues are addressed and functional, successful models are sought that can be implemented on a large scale. The school is making quality education accessible to children previously denied access to this kind of learning environment, which nurtures talent, addresses learning difficulties and provides students with sufficient skills so that they can take advantage of future education opportunities that will develop them even further.

The budgeted amount of R35 000 from NMFA funds has been utilised by the Yeoville Community School. '

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The establishment of the Yeoville educational polyclinic has been very well received by both returnees and by the broader community. As was predicted, there is a great need for the services and expertise that the educational polyclinic has made accessible. This has been evidenced by the great demand for counselling services, remedial education, psychometric testing, speech therapy and programmes relating to social and health issues. The staff are experienced, qualified and highly dedicated. A part-time occupational therapist has been engaged in response to a need articulated by the community. Returnee children are in need of both psychological counselling and remedial assistance. Many have grown up in unstable home environments which have offered little security because of the circumstances of parents. The trauma of relocating to a country that many have never seen, and of being integrated into a society with a prejudiced history, has placed many returnees under exceptional strain, as they try and cope with the demands of a new language, a violent and often ruthless society, and in most instances very impoverished physical conditions. Local children are also in need of the services of the educational polyclinic, because these have not been made easily accessible. Local children also experience learning difficulties because of their exposure to inferior and politically volatile education. They therefore also require remedial help to acquire the conceptual skills they lack to cope with the school curriculum, as well as psychological counselling to address the fact that many come from unstable, impoverished homes. Norwegian funding expended on the educational polyclinic has not exceeded

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the budgeted amount, and stands at R60 000.

.135 ARCHIVES PROJECT:

The cataloguing and indexing of archival material at the University of Fort Hare from the countries of exile continues to progress smoothly, as is confirmed in the attached progress report submitted by the archivist, Professor Sirayi.

The R61,000 budgeted to be utilised to fund the archivist, has been expended as such, as was reflected in our previous report.

It was also mentioned in our report of 28 May 1993, that the SOMAFCO research project would not commence until such time as suitable researchers had been found. It has since been decided that this project will be established in the first quarter of 1994. An advisory committee meeting will recommend the scope and duration of the research to be undertaken. A budget will be drawn up by December 1993, as funds will need to be secured for the senior and-Junior researchers who will be recruited.

We proposed at the beginning of this report that the unexpected additional funds that we received from the Norwegian Ministry of Foreign Affairs in the amount of R65,183.30 in 1993 (due to fluctuations in the Rand's favour in exchange rates), be utilised towards the SOMAFCO research project to commence in 1994. The Batlagae Trust hopes that NMFA will agree to this proposal.

In view of the substantial role that Norway has played in the development of Mazimbu and Dakawa in Tanzania, it is envisaged that the final report that will emerge as a result of the research project, will officially recognise Norway's contribution.

.6 ADM 1 N I SERAII ON:

To date, not all of the budgeted amount of Norwegian funds for administration (R150,000) have been utilised, but it is anticipated that by the end of December the full amount will have been expended.

5. SUMMARY OF BUDGETED AND EKEENDED AMOQNIS ACROSS EAQH ERQQRAMME:

PROGRAMME AMOUNT _EXEEHDLIQRE

ALLOCATED TO DAIE

a. Bursary Programme R1,901,504.00 R1,254,368.27%R

. Support Teachers Programme R 40,000.00 R 40,000.00

c. Yeoville Community School R . 35,000.00 R 35,000.00

d. Yeoville Educational R 60,000.00 R1 60,000.00

Polyclinic

e. Archives Project R 126,183.30 R 61,000.00%R

f. Administration R 150,000.00 R 150,000.00

T O T A L R2,312,687,30 R1,600,368.27

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It is sincerely hoped that the Norwegian Ministry of Foreign Affairs

will agree to our suggestions that the balance outstanding from the bursary programme at 31 December 1994 be re-allocated across all programmes for expenditure in 1994, and that the balance from the Archives project be put towards the SOMAFCO research project which will commence next year.

6. 1994 AND 1995 PROJECTIONS:

As was mentioned in our letter of 4 June 1993, the Trustees of the Batlagae Trust have decided that the organisation must continue to provide its services and run its programmes for at least another two years. At the time that the Batlagae Trust was established, it was anticipated that by the end of 1993, political changes in the country would have ensured the restructuring and re-financing of the education system in particular, and that the special needs of returnees would be catered for in addition to the needs of local students. Clearly, this is not the case. Delays in the negotiating process have resulted in very few significant policy changes, and definitely no change with regard to catering for the needs of returnees. It is therefore vital that the Batlagae Trust continue to exist at least until the end of 1995.

With this in mind, and as the Batlagae Trust begins budgeting for 1994 in particular, we wondered whether you had reached a decision with regard to our request for continued funding over 1994 and 1995. You will recall that in our letter of 4 June 1993 we requested a R1,750,000 allocation from the Norwegian Ministry of Foreign Affairs in 1994, and R1,900,000 in 1995. The Batlagae Trust would like to revise this request and asks NMFA to consider a grant of R2,5 million in 1994 and R2,75 million in 1995.

The reasons for the Batlagae Trust requesting NMFA to consider granting increased amounts in 1994 and 1995 are as follows:

1. The Trustees decision to extend the existence of the Batlagae Trust by two years has left us in a position of having to compile two additional annual budgets on fairly short notice. We have therefore not had a very long time in which to approach donors for additional funds. Some of our donors had not anticipated our existence beyond 1993 and have committed funds to other projects. The Batlagae Trust might have to cope with a shortfall in its 1994 budget.

2. Another perhaps more significant reason for the Batlagae Trust's request for increased funding has to do with the fact that a few of its biggest donors in 1993 have pledged continued support in 1994, but at a reduced level. In particular, we have received letters to this effect from FINNIDA (Finnish International Development Agency), AIDAB (Australian International Assistance Bureau) as well as a number of smaller donors such as KFS (Austria) and the Anti-Apartheid Movements in Holland and the United Kingdom. The Batlagae Trust has been assured by all of these donors that the reason for reduced levels of assistance in 1994 has nothing to do with disillusionment with or lack of faith in the

value of our work. Rather, almost without exception, these donors have informed us that while they recognise the need for bursary support programmes in the country, other more short-term needs like voter-education and assistance to victims of violence, have taken immediate priority with regard to their funding allocations for the time being.

3. In addition to reduced levels of financial support from some of our biggest donors in 1994, approximately eight of our 1993 donors provided us with funding this year as a once-off commitment and can therefore not be approached again for assistance in 1994. The Batlagae Trust therefore has to secure equivalent amounts elsewhere.

4. The Batlagae Trust has also been operating under considerable financial constraints since April, when the NCCR was dissolved. Whereas is the mandated function of the Batlagae Trust to provide bursary assistance to returnees to cater for their educational and related needs (eg psychological counselling and remedial education support), the NCCR used to provide returnees and their families with welfare and maintenance assistance, usually in the form of food, travel and clothing allowances. With the closure of the NCCR offices, returnees can no longer rely on this source for welfare support, and the Batlagae Trust has been flooded with appeals for help. In response to the crisis, the Trustees established an emergency discretionary fund from which returnees in exceptionally difficult and needy circumstances are granted financial aid in addition to their tuition bursaries. The dissolution of the NCCR has further adversely affected the operating costs of the Batlagae Trust in that it used to rely heavily on NCCR regional offices to make sure that the bursary and counselling programmes were being implemented on a national scale. The Batlagae Trust is now having to increasingly enlist the assistance of other bursary agencies across the country, and because the Trust can no longer rely on the co-operation of NCCR personnel in the regions, Batlagae staff are having to make more frequent trips across the country, a cost-incurring exercise.

5. A further reason justifying our request for increased funding in 1994 and 1995, has to do with the number of exiles returning to the country. In June, the Batlagae Trust anticipated that it would have to support an additional 300 beneficiaries in 1994. It is now clear that this figure will more realistically be in the region of 600, and the Trust has to secure additional funding in order to provide financial aid to these students.

In view of the urgent need to arrive at final decisions with regard to 1994 allocations to our bursary holders, we would certainly appreciate your early response, even if only in principle, about whether the Norwegian Foreign Ministry is prepared to continue its sponsorship in 1994 and whether it agrees to our proposed figures.

The Batlagae Trust would like to officially acknowledge thE significant contribution that NMFA has made to it over the last three years, and, records its sincerest gratitude for this financial and moral support. We certainly value our association and hope that it will continue into the new year.

JOHANNESBURG

12 November 1993

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