

EARLY GRADE READING IN SOUTH AFRICA

Policy Research Paper

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Jesal Kika

Luis Crouch

Elizabeth Ninan Dulvy

Tshegofatso Thulare

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THE WORLD BANK 1818 H Street NW

Washington, DC 20433

USA

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The study team was led by Elizabeth Ninan Dulvy, Senior Education Specialist at the World Bank. The report was produced by Jesal Kika (Consultant, World Bank), Luis Crouch (International Reading Expert and Consultant, World Bank), Elizabeth Ninan Dulvy and Tshegofatso Thulare (Consultant, World Bank). The team appreciates the thoughtful feedback received from peer reviewers, Laura Gregory (Senior Education Specialist, World Bank) and Michael Crawford (Lead Education Specialist, World Bank).

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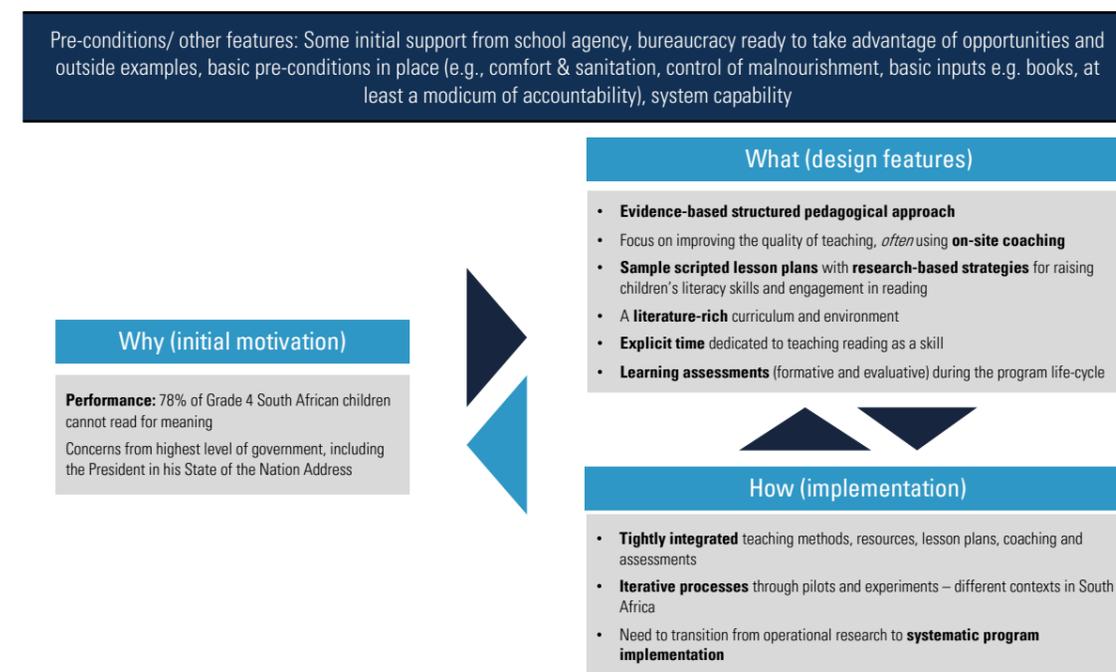
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EXECUTIVE SUMMARY

In recent years, there has been significant momentum in prioritizing early grade reading outcomes in South Africa. As an initial first step to stimulate dialogue on how to take early grade reading (EGR) to scale, this policy paper¹ provides a synthesis of previous and existing early grade reading models in South Africa. The overarching aim of this paper is to build an understanding of what we have collectively learned from early grade reading programs that have been implemented in South Africa, start thinking about how the existing education system can be steered toward effective practices found across initiatives to date and in the literature on effective language instruction, and to advocate for regularly measuring the reading fluency and comprehension of young children with established national targets for improvement.

The graphic below, developed originally on the basis of four global case studies of success, summarizes the lessons learned from the implementation of early grade reading strategies, campaigns, and programs specifically in South Africa, and notes where the situation is as of the writing of this paper. It is adapted from work done on Systems Implications for Core Instructional Support by Crouch (2020). The arrows indicate that there is clear sequencing from the initial motivation through the “Why” to the design features, the “What”, and from the “What” to the “How” when it comes to implementation. There are also feedback and adaptation loops from the “How” to the “What”. Some pre-conditions need to be in place to facilitate this cycle, and effects are likely to prevail over time if managed correctly (Crouch, 2020). The lessons are provided in more detail below.

FIGURE 1. Summary of lessons learned from implementing successful EGR interventions in South Africa



Source: World Bank and Department of Basic Education, EGR Dialogue in South Africa, April 2021 (adapted from Crouch, 2020)

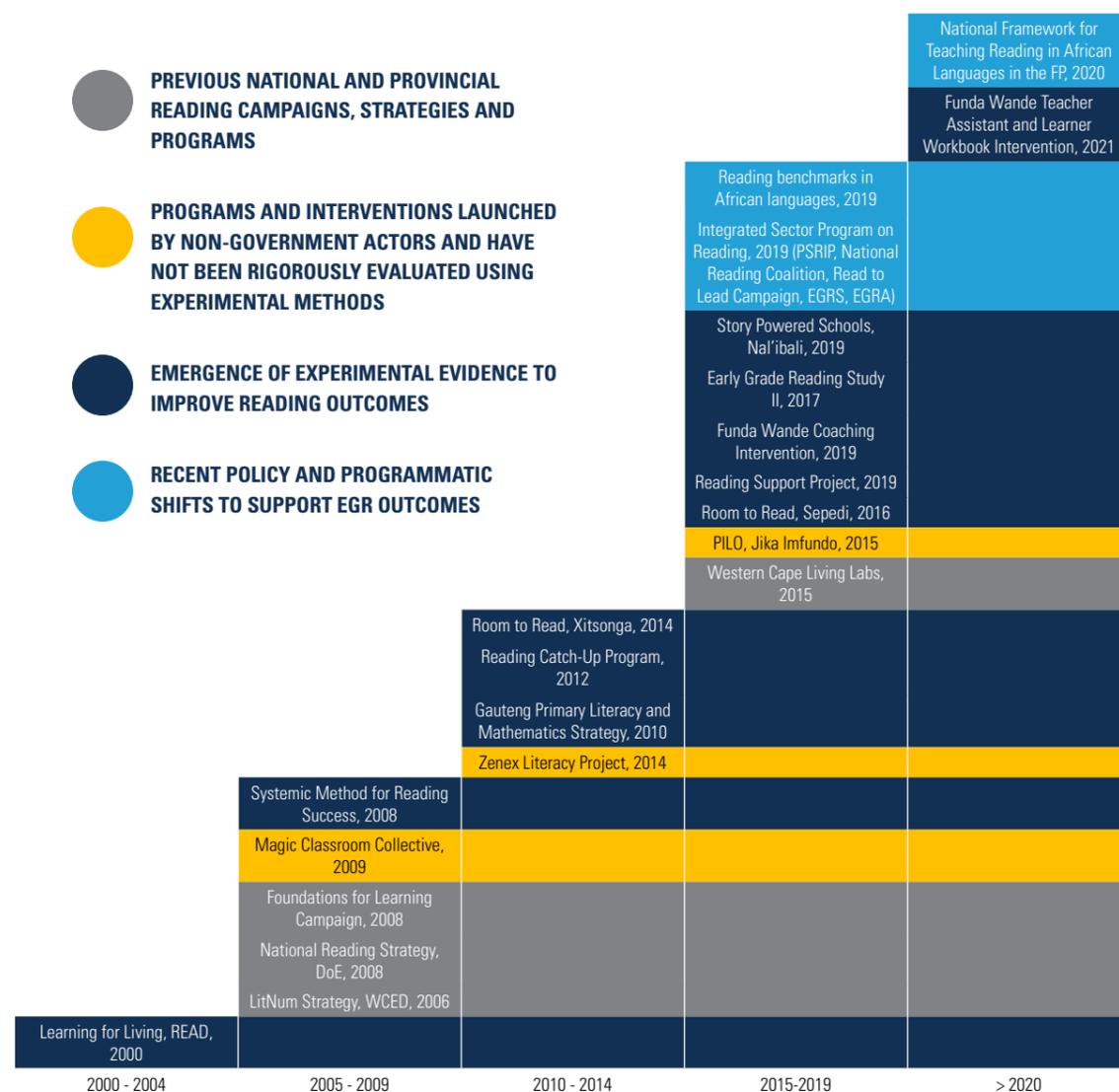
The motivation to focus on early grade reading in South Africa has remained compelling through the years. The prioritization of early grade reading in the country has grown ten-fold over the past two decades - as evidenced by the sizeable number of interventions. This has primarily been the response to a nationally

¹ This policy paper does not represent the views of the World Bank nor the Department of Basic Education in South Africa

consensus-built narrative of a “reading crisis” that both government and local and international partners have rallied around, that has been underpinned using system-wide data from regional and international assessments. The initial “shock value” comes from the Progress in International Reading Literacy Study (PIRLS) assessment, that 78 percent of Grade 4 children cannot read for meaning. This is aligned with the World Bank’s learning poverty measure that all children should be able to read for meaning by age 10, which is often highlighted by the President in his State of the Nation addresses.

While this raises the profile of early grade reading as an indicator of progress and the importance of laying strong foundations in the early years, early grade reading itself, as a programmatic, implementable entity, is not a national policy. This is not to say that there are no programs or policies in place to support early grade reading, but that they often lack coherence, high-level attention funding, or all three (Spaull, 2022). Several of the programs and interventions that are discussed in this note are financed by external parties and there is no consensus or a national goal through widely used reading benchmarks for children across all 11 official languages that learners are instructed in.

FIGURE 2. Number of Early Grade Reading policies, programs, campaigns, and strategies tried over time



Source: EGR dialogue, South Africa, 6-7 April 2021

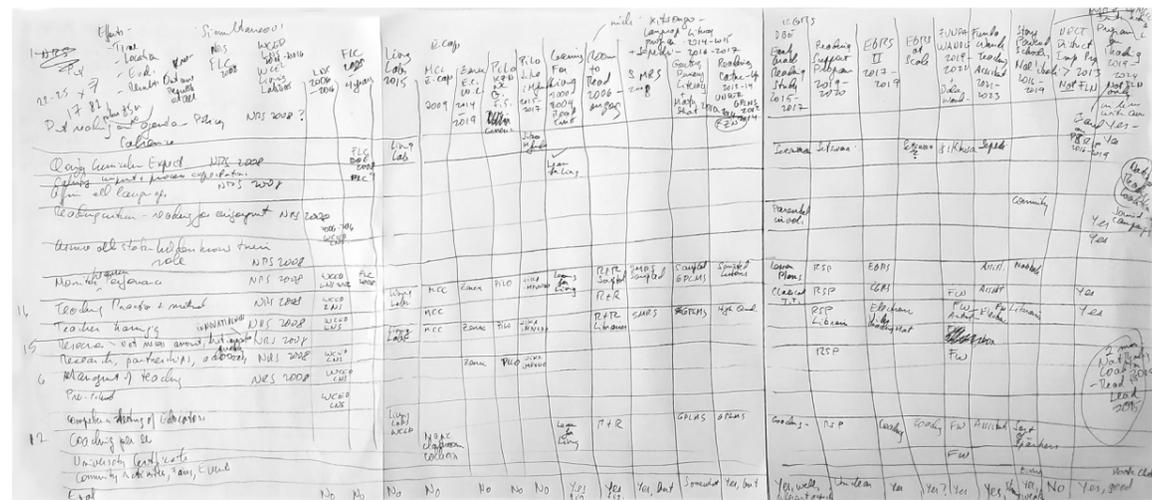
The growth in this national imperative has, however, galvanized a push from the NGO and civil society sector, and has also led to the emergence of provincial reading strategies and pilots, and then to initiatives now being led by the highest forms of government. Almost all the interventions launched in the early 2000s by national and provincial education departments did not stand the test of time (these interventions are highlighted in the grey blocks in Figure 2) and there are several reasons for this. Firstly, these programs lacked a clear, measurable and shared definition of what constitutes “reading for fluency and comprehension”, identifying the language and grade to which the goal refers, clear and realistic implementation plans, as well as clarification on who will do the assessment/evaluation; secondly, these interventions were not evaluated (rigorously, or in some cases really not at all) and had insufficient empirical data on outcomes (and in some cases even on inputs and processes) to support their continuation; thirdly, there was no well thought out and clearly articulated plan for how the programs could be sustained, particularly financially, beyond a single electoral or budgetary cycle; and lastly, there were no measurable goals that formed part of the Department of Basic Education’s performance agreement with the Presidency (Van der Berg, et al., 2016).

Despite these unsuccessful attempts, there have also been successful ones that unfortunately remain sporadic. That is, South Africa has been one of the pioneering countries leading in effective, contextually relevant, structured programs that have been rigorously and independently evaluated to determine if they have an impact on early grade reading outcomes (these are reflected in the green boxes in Figure 2), but as noted they typically do not go to scale either over time or space and/or are not integrated into routine practice. The details of these programs are discussed below.

Design features of early grade reading programs have shown signs of sector-wide learning with the strongest gains in reading outcomes observed structured pedagogical approaches are used. Where in the beginning, initiatives and pilots had focused narrowly on specific issues such as increased reading time, teacher training or the provision of reading materials, most interventions now show the need for a comprehensive and integrated package of structured pedagogical support.

The descriptions in this paper show some 22 to 24 interventions (SMRS, GPLMS, EGRS, Funda Wandu, etc.), depending on how and what one counts (see Figure 3 for an intentionally informal and serious-but-humorous attempt to depict the totality of experimentation for the past twenty years). These approximately 23 (taking the mid-point) interventions had some 17 inputs, processes or “vectors” into the programs implemented in schools (e.g., better materials, coaching, more parental involvement, etc.). The mere fact that there were more interventions than “vectors” suggests that many of these interventions were more or less churning the same vectors or were “re-inventing the wheel”. A tabulation (not shown but carried out by the authors) of interventions as columns and “vectors” as rows thus has 391 cells (17 times 23). But only 81 of them, or about 21 percent were filled, again suggesting a sort of constant churning of more or less the same “vectors.” Some “vectors” were present in 85 percent of the interventions. But there were also many cases where a certain “vector” gets tried only once or twice, often in interventions that either were not evaluated or were evaluated but did not turn out well, which suggests why they may not have been tried much further even if attractive in principle. An example would be the use of university certification of certain teaching techniques, or competence testing of educators. Note the most common “vectors” (not visible) are the most populated rows, and they are teacher training, teacher practices, and classroom resources. We will come back to this below in arguing that “inputs” or “vectors”, at this level of non-granularity are at best not helpful and at worst highly misleading.

FIGURE 3. One of the authors' attempts to come to grips with twenty years of experimentation and special efforts



Given that there have been so many interventions and so many “vectors” in the interventions, any attempt to generalization will easily be met with exceptions. However, granting that there will be exceptions, an analysis by time allows one to conclude that the first things that were tried (say a few years before or after 2005) were the sorts of interventions that were most in vogue globally (and in South Africa) at the time: often emphasizing clarity of accountability (such as clearer statement of learning goals than was common in South Africa in the early 2000s), information for accountability (e.g., assessment), and parental support, community relations and governance. They may have also included somewhat generic teacher support that emphasized what one might call “discovery” or “self-reflection” methods. Examples might include the National Reading Strategy of 2008, the Foundations for Learning Campaign of 2008, and others. Again, in line with what was more or less in vogue at the time, and perhaps carrying over some sensibilities from Outcomes-Based Education (OBE), some of these interventions were not very specific and stayed away from, in essence, telling teachers what they ought to be doing, and yet starting to hold them or the system (somewhat) accountable for results, at least collectively, through measurement and dissemination of results. They also had a large number of “vectors.” These interventions were typically not evaluated well, and, when they were, did not have strong, sharp results. The justified conclusion would seem to be that interventions that emphasize accountability (and rather vague and collective accountability at that) over (teacher) support, that use generic approaches, and use a lot of vectors (the 2008 National Reading Strategy had eleven “vectors”, depending on how one counts), will tend to be weak.

Over time, as evidence both from within South Africa and from other countries started to accumulate, interventions became more specific within each “vector”. A “vector” such as “classroom resources” changed meaning and became much sharper and better-described, assessments became more closely tied to what the interventions started to expect teachers to do in the classroom, and so on. These may have included graded anthologies of increasing difficulty, school or classroom libraries linked to instruction, assessment and monitoring tools that are explicitly linked to the progression of lessons over a yearly scope and sequence, etc. Examples would include EGRS, EGRS II, Funda Wandu, and others. However, the fact that more or less interventions get tried over and over, but sometimes with fundamentally different results, highlights and reminds us of the peril of reasoning in terms of broad generalities such as “teacher support” or “teacher training” or “better materials” without worrying about the details of the precise content of each of these “vectors” and above all, worrying about whether their content and their intended sequential deployment in time (e.g., the sequence of issues introduced in the lessons, and the little mastery checks or mini pedagogical assessments that are used with the children) is well integrated. As we learn more, it becomes utterly clear that it is the precise definition, quality, and “pedagogical management”, of inputs and processes, that makes

them useful or not in helping children learn, not their mere existence or abundance. Yet we often still tend to think in terms of broad categories such as “more training” or “more assessment.”

All that being said, despite all the learning that has happened, one has to admit that, even late into the decade of 2010-2020, attempts could still be found of interventions that had a lot of “vectors” rather than being focused, that emphasized vaguer and more “discovery-based” approaches that essentially seem not to have been listening to (or to some degree resisting) lessons that were already emerging in South Africa and elsewhere. Coordinating campaigns, reminiscent of other “big tent” and campaign-like approaches that mesh together lots of “vectors” rather than achieving focus, are still somewhat common. These are by definition un-evaluable, at least not in conventionally rigorous terms.

The table below highlights interventions that have used structured pedagogical approaches, been rigorously evaluated using experimental methods, and have had a positive causal impact on early grade reading outcomes. Key pillars of these structured pedagogical approaches include explicitly highlighting how to teach reading and ensuring that time for reading occurs; the combination of structured lesson plans and sufficient teaching and learning resources that are grade/level appropriate; regular in-classroom coaching and support for teachers; and the use of formative and evaluative assessments throughout the program’s life cycle. While these programs and interventions are in part externally financed, a consistent thread throughout has been the central role of the provincial and national government, if not as the leading partner, then as close contributors to the design and implementation of the program.

TABLE 1. Overview of recent EGR interventions showing a positive causal impact on reading outcomes

	Early Grade Reading Study (EGRS) I	Funda Wandu Coaching Intervention	Funda Wandu Teacher Assistant & Learner Workbook Intervention
	2015 - 2016	2019	2021
Package of services or policies delivered	<ul style="list-style-type: none"> Structured lesson plans aligned to the national curriculum Supplementary reading materials (including graded readers) Centralized teacher training Monthly on-site coaching Appropriate foundational learning assessments Explicit time dedicated to reading as a skill Emphasis on mother-tongue instruction 	<ul style="list-style-type: none"> Structured lesson plans aligned to the national curriculum Supplementary reading materials (including graded readers consolidated into anthologies) Online resources for teachers and a pre-loaded flash drive On-site coaching (average of 3 times a per month) Teacher training HOD training - two-year part-time certified course on reading for meaning in African languages Appropriate foundational learning assessments Explicit time dedicated to reading as a skill Emphasis on mother-tongue instruction 	<ul style="list-style-type: none"> Activity workbooks for learners Teacher guides Supplementary materials (readers, posters, flashcards etc.) Teacher training HOD training Subject Advisor training One teacher assistant per teacher to increase the frequency of small group and one-on-one teaching Appropriate foundational learning assessments Explicit time dedicated to reading as a skill Emphasis on mother-tongue instruction

	Early Grade Reading Study (EGRS) I	Funda Wandu Coaching Intervention	Funda Wandu Teacher Assistant & Learner Workbook Intervention
	2015 - 2016	2019	2021
Integration	Key inputs are tightly integrated across each of the packages. Structured lesson plans with integrated LTSMs, including graded readers. Teachers were required to assess learners to assign them graded readers and to different reading groups. Integrated with training and coaching.		
Implementation, evaluation method and study sample	<ul style="list-style-type: none"> Implemented by NGO (Class Act) on behalf of DBE RCT 180 no-fee schools in the North West province 	<ul style="list-style-type: none"> Implemented by NGO (Funda Wandu) RCT 60 no-fee schools in the Eastern Cape province 	<ul style="list-style-type: none"> Implemented by NGO (Funda Wandu) RCT 120 no-fee schools in the Limpopo province
Key findings	Positive impact on reading outcomes. After two years of intervention, centralized teacher training resulted in an impact of an extra 30 percent of a year of learning, and an extra 60 percent of a year of learning for the group receiving on-site coaching.	Positive impact on reading outcomes. After one year of intervention, the impact was an extra 48 percent of a year of learning.	Positive impact on reading outcomes. After one year of intervention, the impact was an extra 110 percent of a year of learning.
Take-up and support from national/provincial government	Improvement plan endorsed by cabinet to institutionalize successful elements – structured learning program, guidelines for on-site coaching, developing benchmarks in African languages.	In 2019, the Eastern Cape provincial department distributed anthologies of 22 Graded readers to every Grade 1-3 learner in all schools.	Teacher assistants received a stipend of ZAR3,700 per month paid for by government through the Youth Employment Stimulus (YES) fund.
References	(Cilliers, et al., 2020)	(Ardington & Meiring, 2020)	(Ardington & Henry, 2021)

These interventions, as well as others that have been rigorously evaluated, such as the second Early Grade Reading Study, and Story Powered Schools by Nal'ibali, have also proved to be invaluable in providing longitudinal data² to measure learning losses during the COVID-19 pandemic. This has been in the absence of a standardized national assessment of reading levels of children or any national assessments of learning performance since 2016, though the Department of Basic Education does plan to implement a National Assessment Programme in 2022, which is a sample-based systemic evaluation tool to measure learning progress. In addition, data from such interventions have also been used to benchmark early grade reading in African languages, with South Africa being a pioneer in this space (See Ardington, et al., 2020).

Questions remain on how to transition from operational research to systematic program implementation and how the implementation of these lessons will be taken to scale and sustained. Several of the successful early grade reading interventions are medium-scale and have been, in part, financed and implemented by external parties. Such programs are largely considered pilots or experiments involved in iterative processes to understand the nuances of structured learning programs that work best in the different contexts in South Africa. What has been less clear from the South Africa example is the role of policy and its engagement with incorporating and adopting the lessons learnt into the curriculum and routine program implementation more widely. At present, the learnings, challenges, and successes of interventions have remained closely linked to their implementers/funders, but how these have influenced curriculum standards, Annual Teaching Plans and assessments is less clear. The Integrated Sector Program on Reading (2019 – 2024) by the Department of Basic

Education could prove valuable in a whole-of-government approach as a vehicle for this but outlined sub-programs currently sit as distinct interventions funded and implemented by different coordinating agencies away from the unit leading it. With no clearly defined assessment structure or plan to measure and monitor performance, and no budget set aside for implementation, its reach and sustainability once individual sub-programs are complete, are questioned. Further, there has been no well thought-out and clearly articulated plan for how this program will be sustained beyond a single electoral or budgetary cycle or what a shared, measurable goal of success will look like for the sector. There is, however, awareness and need to coordinate more effectively within the system with the government leading, but how to effectively coordinate so many stakeholders, programs, and interventions, especially without financial resources seems to be a key challenge.

Thus, the most common characteristic of all of the interventions summarized in this paper, including the most rigorously evaluated ones with the biggest impacts, is that no one seems to have quite found a way to assimilate the clearest lessons into everyday practice and, thus, many of these are still not regularized, and strong advocates are often outside the government, rather than routine implementers inside the government. This has not been the case in other geographies that have succeeded in improving foundational outcomes, such as those in Crouch (2020). In those other cases, the new ideas are incorporated, after a few years of having a “special” campaign or “branded” status, into the mainstream of the official, ongoing, to-do list of the educational administrations. Not so, at least not yet, in South Africa. This latter fact, combined with the previous observation, above, that many of the interventions not only seem to re-invent the wheel, but even try methods or vectors that have not been successful in the past, should strike one as a bit unfortunate and frustrating. That is, not only is there, yet no firm way to onboard the learning, but one seems to even have to keep doing the learning over and over. The reasons why this has not yet happened are not clear—but they are researchable. A concluding section of this paper notes some hypotheses and suggests means to research them, so that South Africa can get onto a firmer implementation path.

2 Longitudinal data allows one to compare learning gains at the individual level

INTRODUCTION AND CONTEXT

Learning to read for meaning is one of the most important skills that a child can acquire in the early years of schooling. The ability to decode text, read with comprehension, and learn from reading is at the heart of most activities in institutions of learning (Spaull & Hoadly, 2017). Based on the understanding that all future learning rests on this foundation, it is not surprising that reading is often used as an indicator of how well an education system is delivering on its mandate. Reading proficiency is an easily understood metric of learning and for centuries has been at the core of formal education in literate societies. When a child becomes proficient in reading, it unlocks doors to the vast knowledge codified in all types of texts. Reading proficiency can also serve as a proxy for foundational learning in other subjects. Evidence shows that reading proficiency is highly correlated with proficiency in other subjects at a school and country level. For example, the correlation between a country's reading score on the Progress in International Reading Literacy Study (PIRLS) assessment and its mathematics score in the Trends in International Mathematics and Science Study (TIMSS) is 0.95 (World Bank, 2019).

The main goal of reading is comprehension, which is underpinned by two core sets of skills. The first being oral language comprehension, which is the ability to use and understand spoken language; and the second is decoding, which is the ability to read familiar words accurately and decode unfamiliar words that are out of context (Scarborough, 2001). Both decoding and comprehension are dependent on oral reading proficiency, and this includes vocabulary knowledge, listening comprehension, and knowledge of grammar (Spaull & Pretorius, 2019). Decoding skills refers to the ability to decipher a code, whereby for a language with an alphabetic writing system, spoken language is represented by print letters that stand for speech sounds. In turn, decoding relies on various skill sets such as phonemic awareness i.e., the ability to identify single sounds within spoken words, letter-sound knowledge (measured as letter-sounds read correct per minute), word reading and oral reading fluency (often measured as words read correct per minute) (Adams, 1990). By age 10, children are expected to decode most words and start to grow as independent readers, and once children learn to decode and become fluent readers, they read faster and this enables them to focus on the meaning of text – with faster reading implying more practice, and often, greater enjoyment (World Bank, 2019).

In South Africa, out of a population of approximately 59 million, about 13.5 million children are attending school (Grade R to Grade 12) out of which 8.5 million children are in 15,500 primary schools. Further, roughly 1 million children are born each year. There are a total of 11 official languages in the country, 9 of which are African languages. In the Foundation Phase, particularly, Grades 1 – 3, children are expected to learn in their Home Language (which is often an African language) and a First Additional Language (often English). At the end of the Foundation Phase, or when children are in Grade 4, they are expected to read for meaning in any of the official languages, i.e., they are expected to locate and retrieve explicitly stated information or make straightforward inferences about events or reasons for actions (Mullis, et al., 2016) – this is the Low PIRLS International Benchmark. With per learner expenditure of ZAR19,099³ in 2018/19 (approximately USD 1,270) (Spaull, et al., 2020), the goal should be to teach approximately 1 million children per year to become fluent, capable, independent readers (who read a variety of texts with comprehension) in the 11 official languages of instruction that cover the cohort.

3 Discounted using a basic education price index (BEPI)

TABLE 2. Size of the challenge in South Africa

	Total population	59 million	
	Children born each year	1 million	
	Total school-going population (Grade R to 12)	13.5 million	
	Primary school enrollment (Grade R to 7)	Grade R	779 591
		Grade 1	1 118 607
		Grade 2	1 109 319
		Grade 3	1 098 434
		Grade 4	1 127 877
		Grade 5	1 097 094
		Grade 6	1 073 761
		Grade 7	1 062 877
	Primary schools	15,500	
	Teachers in primary schools	235,000	

Sources: World Bank data (2022), Statistics South Africa (2021), Department of Basic Education (2022), Education Management Information System (EMIS) data (2020)

Education systems in several African countries are plagued with low learning outcomes which are reflected in their performance in international assessments. The 2016 PIRLS Literacy results revealed that 78 percent of Grade 4 children in South Africa could not read for meaning in any language (Howie, et al., 2018) i.e., they could not reach the Low PIRLS International. While a recent paper by Gustafsson (2020) shows that there has been a significant improvement in the PIRLS assessment performance between 2006 and 2016, these improvements were made from a low base and at this rate of improvement, South Africa's reading scores in 2040 would only be on par with that of Iran in 2016 and Indonesia in 2011 (Gustafsson & Nuga Deliwe, 2020). South Africa lags far behind its upper-middle-income country counterparts, with most South African children not able to read for meaning by the age of 10.

The Southern and Eastern African Consortium for Monitoring Education Quality (SEACMEQ) study also provides the most recent account of comparable learning assessment scores in literacy and numeracy for Grade 6 learners.⁴ In 2009, the reading and mathematics scores in South Africa were below the regional averages for East and Southern Africa. More than 70 percent of learners in South Africa could not read

4 SEACMEQ IV (2013) data was only made available in 2022

for meaning or do basic numeracy (SEACMEQ, 2019). South Africa's comparatively low learning levels persist despite the country spending a much higher share of Gross Domestic Product (GDP) (6 percent) on education compared to regional standards (World Bank, 2018), coupled with an almost universal primary enrolment rate and government policies which ensure that most children have access to mother-tongue education in the Foundation Phase (first three years of primary schooling i.e., Grade 1 – Grade 3) which serves as the Language of Learning and Teaching (Pretorius & Spaull, 2016).

The trajectory for improvements in learning outcomes has been fragile and now faces additional risks due to the COVID-19 pandemic. Gustafsson and Nuga Deliwe (2020) argued that learning losses in South Africa were expected to go beyond what is suggested by the actual number of schooling days lost since prolonged school closures could have resulted in children forgetting the skills they had acquired before school closures. Using three different longitudinal studies on early grade reading in no-fee schools across a range of provinces in South Africa, Ardington et al. (2021) established learning losses in reading due to the COVID-19 pandemic for Grade 2 and Grade 4 learners. The study found that Grade 2 learners lost between 57 percent and 70 percent of a year of learning when measured in terms of reading outcomes relative to their pre-pandemic peers. Learning losses of between 62 percent and 81 percent of a year of learning⁵ were estimated for Grade 4 learners. Learners in the school samples lost about 56 percent–60 percent of the number of contact teaching days that they would have ordinarily received in a pre-pandemic school year due to a combination of school closures and rotational timetabling schedules. This implies learning-to-schooling loss ratios⁶ of between 1 and 1.4 in line with earlier assumptions of Gustafsson and Nuga (2020) at 1.25 (Ardington, et al., 2021).

Global efforts at measuring the long-term impact on learning posed by prolonged school closures are still ongoing. A recent study using a calibrated 'pedagogical production function' estimated learning losses of Grade 3 learners from the temporary shock caused by the abrupt pandemic-related school closures of March 2020 by modelling learning trajectories of low to middle-income countries that participate in the Programme for International Student Assessment (PISA) (Kaffenberger, 2021). Assuming no further dropouts, the model found that reducing just a third of a year of learning (roughly 3 months of schooling) in Grade 3 resulted in children's scores being almost a full year behind where they would have been when they got to the end of Grade 10. The study corroborated the findings of other simulation studies including a study focusing on the long-term impact of disaster-related school closures following Pakistan's 2005 earthquake, that much more learning was lost after children returned to school, which could be attributed to children falling behind the curriculum and not being able to catchup (Andrabi, et al., 2020). Further, early evidence emerging from studies in Ethiopia, India and Pakistan suggests that learning progress has slowed down relative to the pre-pandemic cohort of children (Kim, et al., 2021; Banerji, 2020; Akmal, et al., 2020). These studies, among others, underscore the importance of strengthening foundational skills and using learning data to target instruction at the level of the child (Global Education Evidence Advisory Panel, 2022).

In South Africa, early grade reading itself is not a national policy, though numerous policies and presidential state of the nation addresses have raised the profile for the need to strengthen the reading skills of young children. Many of the programs and interventions that will be discussed in this note are financed by external parties and there is no consensus or a national goal through widely used reading benchmarks on early grade reading levels for children in all the languages learners are instructed in. There is also no standardized national assessment of reading levels of children that is consistently used across provinces nor any national assessments of learning performance since the last Annual National Assessment (implemented in Grades 3,6, and 9) in 2016, though the Department of Basic Education does plan to implement a National Assessment Programme (NAP) comprised of a sample-based systemic assessment for Grades 3, 6 and 9; a diagnostic

assessment⁷ administered by teachers in the classroom to identify learning gaps and plan for remedial measures; and a summative assessment administered at the end of Grade 9. In addition, though a program for the development and use of the Early Grade Reading Assessment (EGRA) toolkit in all 11 languages exists within the department, this has remained at a pilot-scale across numerous provinces and has never been directly adopted for continued use and monitoring of reading at a national level (Department of Basic Education, 2019a). Thus, in the early grades, no rigorous national metric to gauge reading proficiency exists in South Africa.

Evidence from recent systematic reviews suggests that structured pedagogical programs or structured learning programs are effective at promoting student learning outcomes and instructional change by teachers in the early grades for both reading and mathematics (Fleisch, 2018; Snilstveit, et al., 2016; Popova, et al., 2016). These programs use a combination of measurement, highly specified curricula, teacher training on instructional methods, continuous teacher support such as on-site coaching and/or mentoring, and the provision of appropriate teaching and learning materials. As this paper will show, the focus in South Africa now should be on scaling up programs that build strong reading foundations in children through a structured pedagogical approach⁸.

Since 2006, both the national and some provincial education departments in the country have launched different reading initiatives, strategies, interventions, and policy documents, all focusing (to various degrees) on trying to improve reading in the Foundation Phase (Grade 1 to Grade 3). While progress has been made, there are still evidence gaps about the programs, policies, and behavioral mechanisms in place to effect changes in learning outcomes in the early grades, and in bringing what evidence does exist into practice. If these structured programs are implemented well, they have the potential to produce results in 3 to 5 years with lessons that could be generalized for other grades and subjects. Despite growing evidence on these issues, ineffective practices seem to persist in many settings. These are important to note, as even one ineffective practice, in an otherwise good or well-intentioned intervention, can reduce impact markedly.

While several schools were receiving a range of interventions over time, the bulk of schools in the system were still operating as "business as usual". Prior to around 2012, there was a clear lack of resources in Foundation Phase classrooms. Between 2011 and 2013, national catalogues were established by the Department of Basic Education for Learning and Teaching Support Materials that were aligned to the new curriculum. Apart from national workbooks, schools are at liberty to select additional resources from the national catalogue which are procured and delivered to each school by the respective Provincial Education Department. However, the use of these materials and training around these materials are not known. Lesson plans have become increasingly available across a number of websites (Department of Basic Education, National Education Collaboration Trust etc.), but teachers do not necessarily print them or use them in classrooms. Further, the National Framework for Teaching Reading in African Languages in the Foundation Phase was introduced in 2020, which was seen as a supplement to the Curriculum and Assessment Policy Statement (CAPS) curriculum, but this has simply been an additional resource in classrooms with no clear training on using the framework. Teachers receive in-service training on Home Language instruction; however, the substance of the training is unclear. In addition, pre-service training focusing on teaching reading in African languages has only been introduced in a select number of universities in the past 3-4 years. There is no in-classroom coaching taking place, and only 13.4 percent of schools reported receiving a visit from a district official at least two times a year (Department of Basic Education, 2018). Deeper analysis would be required to understand the gap between regular classroom instruction and what is considered effective practice through the range of reading interventions.

5 One year of learning is equivalent to 0.4 standard deviations

6 The relationship between learning-adjusted time lost and actual school days lost

7 Monitoring at an earlier age is required to course correct. This can be done through a light screening check, as opposed to a more in-depth EGRA, which could assist in identifying children most in need. An example would be the phonics screening check implemented in London (see <https://www.gov.uk/government/publications/phonics-screening-check-2019-materials>)

8 The term structured pedagogy is broadly defined as a specifically designed, coherent package of investments that work together to improve classroom teaching

This paper presents some of the key policies, programs and interventions which have focused on/are currently focusing on improving reading outcomes in the early grades in South Africa. Its primary objective is to take stock of the national reading project and assess what has been collectively learned from early grade reading programs that have been implemented over the past 15 years. It begins by unpacking some of the previous national and provincial strategies and initiatives and why these interventions did not stand the test of time. The note describes other interventions and efforts which are ongoing or completed and launched by non-government actors that have not been rigorously evaluated but may have important lessons. It also looks at the emergence of quasi-experimental and experimental evidence to improve reading outcomes, specifically using rigorous impact evaluations. The note further highlights recent policy and programmatic shifts in support of improving early grade reading outcomes in the country. The policy paper does not document every detail of each of the programs and interventions, but simply aims to highlight relevant information to stimulate dialogue on taking early grade reading to scale in the country. A limitation has also been the lack of information which is easily accessible or available in the public domain.

PREVIOUS NATIONAL AND PROVINCIAL READING CAMPAIGNS, STRATEGIES, AND PROGRAMS

As stated, since 2006 both the national Department of Basic Education and some Provincial Education Departments have launched different reading initiatives, strategies, interventions, and policy documents, all focusing (to various degrees) on trying to improve literacy outcomes in the Foundation Phase. However, there have been little to no success stories in terms of improving reading outcomes. Below is an overview of some of these initiatives, if only to bring them to the fore when thinking about reading strategies moving forward.

1. NATIONAL READING STRATEGY, DEPARTMENT OF EDUCATION (2008)

A National Reading Strategy (Department of Education, 2008) was developed in 2008 with the vision that *“Every South African learner will be a fluent reader who learns to read and reads for enjoyment and enrichment”*. The purpose of this strategy was to put reading firmly on the school agenda; clarify and simplify curriculum expectations; promote reading across the curriculum; affirm and advance the use of all languages; encourage reading for enjoyment; and ensure that teachers, learners, parents, and the broader community understand their role in improving and promoting reading.

The strategy was built on six key pillars for success with the intended outcome that *“...all learners must be able to read basic texts by the end of Grade 3”*. The six pillars included: (i) Monitoring learner performance; (ii) Teaching practice and methodology; (iii) Teacher training, development, and support; (iv) Resources; (v) Research, partnerships, and advocacy; and (vi) Management of teaching of reading.

The 2008 strategy is no longer in practice with experts advocating for a new national reading strategy based on empirical data, clearly situated in relation to earlier policy proposals and interventions. It should have a clear and measurable shared definition of what constitutes *“reading with fluency and comprehension”*, a clearly articulated strategy for the plan to be financially sustained beyond election or budgetary cycles and use realistic reading goals as a central component of performance agreements between the DBE and the Presidency (Van der Berg, et al., 2016). Currently in development is a National Sector Reading Plan, that could potentially fill this void (Department of Basic Education, 2019c). While the details of the plan have yet to be publicly shared including when and how it will (or is being) rolled out, it is assumed that the plan will be adopted nationally to guide multiple, yet disparate efforts across provinces to coordinate the instruction and assessment of reading in all languages. Reference to the monitoring of its implementation was published in the recent DBE Annual Performance Plan: 2021 – 2022 as an indicator under the Curriculum Policy, Support and Monitoring programme. The indicator promises the development of an approved, provincially verified, annual sector report that focuses on the implementation of the National Reading Plan (Department of Basic Education, 2020).

2. WESTERN CAPE EDUCATION DEPARTMENT (WCED) LITERACY AND NUMERACY STRATEGY, 2006 – 2016

The Western Cape Literacy and Numeracy (LITNUM) strategy (Western Cape Education Department, 2006) was developed specifically for the Western Cape province and had high-level similarities with the 2008 National Reading Strategy. The strategy identified eight domains for intervention, including (i) Monitoring and support; (ii) Changes to classroom practice; (iii) Teacher development; (iv) Learning and teaching support material; (v) Research; (vi) Coordination and sustainability; (vii) Advocacy, family, and community literacy; and (viii) A pre-school programme.

The strategy also identified critical aspects to offer the greatest impact. Firstly, teacher development and support had intended to improve the competency of teachers to ensure successful teaching and learning of language and mathematics and the development of high-level literacy and numeracy skills. Secondly, the Language-in-Education Transformation Plan and attention to language support in the classroom. While provincial targets aimed to conform to national policy, the strategy sought to include the following province-specific elaborations: (i) a learner’s mother-tongue should be actively supported in the classroom where possible, at least until the end of Grade 6; and (ii) in addition to learning two official languages as a subject, learners in the Western Cape should receive a minimum of three years tuition in a third language between Grade 7 and Grade 9.

Little exists in the public domain on the impact or changes that resulted from the strategy for the past 16 years or whether the interventions guided by it led to the expected learning gains in literacy. More recently, the Western Cape Education Department has a more explicit reading focused strategy namely, the Western Cape Reading Strategy 2020 – 2025. In its introduction, a small reference is made to the initial LitNum, stating that, *“the strategy has been strengthened to improve learner performance, with a focus on reading”* (Western Cape Department of Education, 2020). The six new pillars for the 2020 – 2025 strategy include (i) Learner support through different intervention strategies; (ii) Provision of learning and teaching support materials; (iii) Teacher professional development; (iv) Research; (v) Advocacy; and (vi) Parent/community involvement. The effectiveness of this new strategy has not yet been evaluated.

3. THE FOUNDATIONS FOR LEARNING CAMPAIGN, DEPARTMENT OF EDUCATION, 2008

The Foundations for Learning Campaign (Department of Education, 2008) was a four-year campaign aimed at creating a national focus to improve the reading, writing and numeracy abilities of all South African children. The campaign focused on providing teachers and schools with clear directives on the Department of Education’s expectations to achieve the required levels of performance in literacy and numeracy. These directives centered around teaching time, daily teacher activities, recommended resources, and monitoring and support. It had the ambitious aim of increasing the average learner performance across both skills in primary schools by no less than 50 percent in the four years of rollout. Following this, a national evaluation of Grades 3 and 6, which would later be known more commonly as the start of the Annual National Assessments (ANAs), would be undertaken to assess the curriculum innovations’ impact (Meier, 2011).

The campaign was launched by the Department of Education, in collaboration with the United Nations Children’s Fund (UNICEF) through a two-day conference which sought to *“strengthen and sustain the Foundations for Learning campaign and to showcase best practice in the Foundation Phase, especially in the teaching of reading, writing and calculating”* (Department of Education & UNICEF, 2008). Though no further mention is made of the program in later departmental annual reports, the basis of the assessment tasks in the 2011 ANA had been drawn from the National Curriculum Statement as well as the reading milestones articulated in the campaign (Department of Basic Education, 2011).

4. WESTERN CAPE “LIVING LABS” SCHOOLS, 2015

The Member of the Executive Council (MEC) for education in the Western Cape outlined a renewed focus on Grades R-3 over the next 4 years in her 2015/16 budget vote speech (Western Cape Education Department, 2015). The “Living Lab” project was launched in 100 schools to improve language and mathematics teaching based on studies from around the world. The aim was to ensure that when learners left Grade 3, they could read, write, and calculate at the required levels.

The MEC highlighted the main findings and recommendations from reviewed studies used to inform the Living Labs project: “(1) The need for competence testing and careful selection of Foundation Phase Heads of Department; (2) The presence and integrated use of various reading materials and Foundation Phase equipment; (3) The development and use of norms for reading, writing and mathematics progress in each quarter of grades R – 3; (4) Assessing teachers’ capacity to teach English FAL and providing the necessary training for this; and (5) Providing qualified and trained mathematics teachers for dedicated teaching of all grade 1, 2 and 3 classes” (Western Cape Education Department, 2015). There is no documented evidence on the implementation and effectiveness of the project.

SUMMARY

The bottom line to the above four cases is that despite many literacy interventions and reading programs that have been launched by national and provincial education departments, almost all these initiatives did not stand the test of time and there are several reasons for this. Firstly, these programs lacked a clear, measurable and shared definition of what constitutes “reading for fluency and comprehension”, identifying the language and grade to which the goal refers, as well as clarification on who will do the assessment/evaluation; secondly, these interventions were not evaluated and had no empirical data on outcomes to support their continuation; thirdly there was no well thought out and clearly articulated plan for how the programs could be sustained, particularly financially, beyond a single electoral or budgetary cycle; and lastly, there were no measurable goals that formed part of the Department of Basic Education’s performance agreement with the Presidency (Van der Berg, et al., 2016).

PROGRAMS AND INTERVENTIONS LAUNCHED BY NON-GOVERNMENT ACTORS AND HAVE NOT BEEN RIGOROUSLY EVALUATED USING EXPERIMENTAL METHODS

While there have been several interventions to improve early grade reading at the primary level over the years, few of them have been rigorously evaluated using experimental methods to determine if they have an impact on improving reading outcomes. Findings may often point to anecdotal evidence or qualitative reviews that are non-causal. Although these interventions lack rigorous evaluation, there are lessons to be learnt.

1. MAGIC CLASSROOM COLLECTIVE (MCC), 2009

Since 2009, the Nelson Mandela Institute (NMI) at the University of Fort Hare has been working in close partnership with a group of Foundation Phase teachers in rural Eastern Cape through the Magic Classroom Collective (Ramadiro & Porteus, 2017). Placing the rural child at the center, the goal of the MCC as a long-term intervention research program is to design and develop tools, materials, strategies, and systems accountable to the teaching and learning context of most South African poor schools. The design principles emerging from each phase of work are presented for the Home Language, i.e., isiXhosa; English as a First Additional Language (EFAL); and Mathematics subjects. The MCC focused on 14 poor and deeply rural school communities in the Eastern Cape, supporting over 6,000 learners. The study was framed by education design research. The premise guiding the intervention at the start rested on two interrelated claims: (i) There has been little research into the use of African languages for teaching and learning; and (ii) there has been little long-term research embedded specifically in poor classrooms.

The MCC iterative design cycles include the following:

- **Toolkit redesign, production, and distribution:** Before each school term, a complete toolkit of instructional materials was (re) designed and (re) developed for each grade. The toolkit was reproduced for all teachers and learners in the collective and included materials such as workbooks, teacher support materials, and teaching tools such as sentence strips, counters, and posters.
- **Teacher development and reflection workshops:** Before each term, teachers came together at a central workshop to reflect on the tools of the previous term and orient teachers on the current term’s tools.
- **Classroom coaching and field testing:** A near-peer coach spent one full teacher day with each teacher per term to support teachers through discussions, demonstrations, co-teaching, and co-planning and to brainstorm, observe and review learners’ work and learn from teachers on how to improve instructional tools.

While the program has not been rigorously evaluated, some of the key findings (Ramadiro & Porteus, 2019) include the following:

- **Teacher development and support:** When teachers are taught and supported through the language of instruction in the classroom, when the content of teacher development focuses on how to facilitate literacy and learning through an African language, and where normative expectations are aligned with poor classrooms, teachers’ instructional practices expand, and learner performance improves.
- **Curriculum and instructional tools:** When teachers engage with tools and ideas that have been carefully field-tested over time within the educational context of their classrooms, teachers’ instructional practices expand, and learner performance improves.
- **Research:** Long-term research embedded within African language speaking classrooms is required to build stronger ideas, tools, and practices to improve teaching and learning in poor schools.

2. ZENEX LITERACY PROJECT (ZENLIT), ZENEX FOUNDATION, 2014 – 2019

The Zenex Foundation launched the ZenLit (Zenex Foundation and Evaluation Research Agency (ERA), 2020) project as a pilot to improve literacy outcomes in the early grades. The purpose of the resource-intensive pilot project was to assist Foundation Phase teachers with Home Language and English as a First Additional Language (EFAL) teaching to improve learner performance in those languages. The rationale for supporting both languages in the Foundation Phase was that strengthened skills and competencies in the Home Language assist the acquisition and competence of additional languages.

Three districts were selected in three different provinces, i.e., the Western Cape (isiXhosa and English), Eastern Cape (isiXhosa and English) and KwaZulu Natal (isiZulu and English). The contexts in each of these provinces were also different with a total of 21 schools being selected. The duration of the project was initially three years, from July 2014 to December 2017. In 2018, a fourth year was added for a Head of Department (HoD) intervention. The project closed in March 2019.

The ZenLit project included the following components:

- **Intervention with Foundation Phase teachers:** The Project assisted teachers to implement the National Curriculum and Assessment Policy Statement (CAPS) in Home Language and English as a First Additional Language and focused on classroom management, learner assessment and how children learn a second language. The intervention mainly focused on reading, comprehension, and writing. Twenty-four days of training and four in-class specialist coaching sessions were provided each year.
- **Intervention with Foundation Phase HoDs:** The Project assisted Heads of Departments (HoDs) to support teachers on content and effective delivery of the literacy curriculum. A 14-day accredited training course and four on-site specialist coaching sessions were provided per year.
- **Literacy resources:** All Foundation Phase classrooms were provided with the minimum basic teaching resources based on the audit of needs completed during the project set-up phase. Also, a basic reading system with reading books, vocabulary charts and flashcards were provided for each class. These reading books were drawn from the provincially approved list and considered the resources that were already in schools.
- **Capacity building:** Capacity building took place at three levels - Service Provider, Research and Evaluation and Materials Development.

The evaluation method adopted a multiple case study design. The necessary conditions for experimental or quasi-experimental design did not apply. Schools were not randomly assigned since they were purposefully selected based on explicit criteria (Zenex Foundation and Evaluation Research Agency (ERA), 2020). A key conclusion from the evaluation is that HoDs have the potential to serve as change levers in the system. This is of critical importance in the search for sustainable and contextually relevant solutions where there are few Subject Advisors to support teachers. This evaluation provides important insights into understanding the conditions under which HoDs can be most effective. The challenge of time to adequately provide support for teachers remains an issue for all HoDs, given that most HoDs are full-time teachers.

3. PROGRAM TO IMPROVE LEARNING OUTCOMES (PILO)

The Program to Improve Learning Outcomes (PILO, 2020) is a multi-stakeholder, district-wide intervention, to improve district and school capacity to deliver the curriculum and subsequently bring about gains in learner outcomes. PILO works with provincial education departments in KwaZulu-Natal, Free State and Gauteng, and has previously worked in the Northern Cape. The support provided by PILO includes the following:

- **District support program:** Enables District Leaders, Circuit Managers and Subject Advisors to plan together, implement and review results using evidence and dialogue. This leads to improved relationships with school management teams (SMTs) and teachers and a stronger focus on improving teaching and learning.
- **School management teams (SMTs):** SMTs (Principals, Deputies and Department Heads) are enabled to support teachers to make better decisions on how to cover the curriculum so that most learners learn what they are supposed to learn. A course of 6 to 9 modules on leadership and curriculum management for SMTs is conducted over 2 to 3 years.
- **Teaching and learning support:** Teacher learning and support combine two processes. In some provinces, teachers receive Foundation Phase lesson plans and trackers, as well as Mathematics, Science and Language trackers. These trackers assist teachers to track coverage and reflect on progress providing evidence for professional conversations and judgements. Also, Subject Advisors are supported to schedule, plan and deliver targeted workshops for Department Heads (Lead Teachers) to strengthen content knowledge and curriculum management skills.

Jika iMfundo, 2015 – 2017

One of PILO's flagship projects is the **Jika iMfundo** program in KwaZulu-Natal which was been run as a campaign between 2015 and 2017 in 1,200 schools in two districts in KwaZulu-Natal. The program aimed to improve learning outcomes across the system by simultaneously focusing on the capacity of different levels of the system, specifically, the school and the district to monitor and respond to problems of curriculum coverage (Christie & Monyokolo, 2018). The focus of Jika iMfundo was to improve curriculum coverage which was expected to have a positive effect on teachers' pedagogical skills and learner outcomes (Pillay, 2018). The campaign was supported by the National Education Collaboration Trust (NECT) since 2014 and belongs to the KwaZulu-Natal Department of Education. The interventions have been designed at scale with recurrent costs that can be accommodated within the department's budget (Christie & Monyokolo, 2018).

In 2014, the intervention focused on training district and provincial staff using trainers hired by the NECT. This was followed in 2015 and 2016, by rolling out the program to schools in selected districts. The school-based program focused on interventions and training with language and Mathematics teachers from Grades 1 to 12 and Science teachers from Grades 8 to 12.

Teachers were provided with **lesson plans** covering the curriculum of the selected grades and subject areas and included a focus on classroom-based learner activity, as well as **on-site training** and **off-site coaching**. Teachers and heads of departments attended training workshops three times per week for a little over one year. The workshops were run as participatory sessions aimed at working through the challenges of planning and implementing the curriculum. Coaching was conducted in clusters of schools where the focus was on helping teachers and managers to use the tools to monitor, report and respond to curriculum coverage problems and to encourage collaborative processes to identify and solve problems of coverage.

Coaching sought to strengthen the skills of supervision and curriculum management and to encourage groups of schools to work together to jointly problem solve. Teachers were also provided with implementation toolkits and trackers to help keep track of curriculum coverage within a set time frame.

Heads of departments were provided with supervision and management tracker tools that ensured that they interacted regularly and defined goals with the teachers under their supervision. Jika iMfundo makes no content-related intervention and uses the existing and standardized CAPS curriculum.

Key findings from an audit report (compiled by the Auditor-General of South Africa in 2017) on the curriculum support and monitoring provided by education districts to schools highlighted the following (Christie & Monyokolo, 2018):

- There was an uneven distribution of schools to subject advisors, resulting in inconsistent curriculum support across schools.
- Subject adviser posts were vacant due to budgetary constraints.
- Recommendations were not always provided to address shortcomings identified during school visits, and if recommendations were provided, they were not always included in school improvement plans.
- Management information systems and processes to evaluate the frequency, adequacy, and outcomes of on-site curriculum support to schools did not enable effective monitoring.

The implementation of these programs (broader PILO and Jika iMfundo) across schools in South Africa has not undergone rigorous evaluations, and hence, one cannot make any conclusions about its impact on learning outcomes.

THE EMERGENCE OF EXPERIMENTAL EVIDENCE (QUASI-EXPERIMENTAL AND FIELD EXPERIMENTS) TO IMPROVE READING OUTCOMES

Experimental research can be grouped into two broad categories: true experimental designs or field experiments such as Randomized Control Trials (RCTs), or quasi-experimental designs. Overall, it enables the interpretation of the correlation between a particular policy or program (the cause) and the outcome of interest (the effect), and one can interpret the observed correlation between the two as an accurate reflection of the causal relationship (Taylor, 2019). These types of evaluations are considered to be rigorous (USAID, 2010). While true experiments such as RCTs require random assignment, quasi-experiments do not.

There is a growing recognition that teachers need support in implementing the curriculum, especially when it comes to teaching reading in the early grades. International evidence suggests that programs that have consistently shown positive and large impacts on learner performance are programs where resources are provided as part of a more comprehensive intervention package that includes training and support in the use of these resources. Structured learning programs seem to be successful in improving both instructional change and learning outcomes (Snilstveit, et al., 2016). Structured pedagogical approaches help teachers to gain the knowledge and skills required for effective practice by providing them with clear guidance and materials that show them exactly how this is done, with the goal of upskilling teachers and not deskilling them by continuously providing scripts throughout their career. Within these structured learning programs, the mode of delivery matters (Popova, et al., 2016). Further, on-site coaching for teachers appears to be quite successful. Kraft et al. (2018) conducted a meta-analysis of 44 coaching programs in the United States and found a pooled effect size of 0.11 standard deviations on academic achievement for large-scale effectiveness studies with 100 teachers or more. In South Africa, current research has built on lessons learnt and promising insights from similar iterations of programs and interventions to improve teacher instruction and children's reading outcomes. The emergence of these and how they have evolved is documented below.

1. LEARNING FOR LIVING PROJECT; READ, EDUCATION AND DEVELOP (READ) EDUCATIONAL TRUST, 2000 - 2004

The Learning for Living project provided additional Home Language reading materials, monthly visits from coaches and a structured teaching cycle aligned to the curriculum. The project was designed and implemented over five years by the READ Educational Trust in 957 schools spread across the nine provinces in the country. The evaluation of the Learning for Living project took on a quasi-experimental design, where READ staff members nominated schools that had achieved high levels of program implementation as the treatment schools to be evaluated. Government officials further selected schools that closely mirrored the demographics of the intervention schools as the control schools. The evaluation was conducted four years into the implementation and assessed Grade 1 and Grade 2 learners in their Home Language (Sailors, et al., 2010). The evaluation found positive and strong effects for the READ Home Language Initiative. The short-term implications of this study were that Foundation Phase English learners performed better in their Home Language when their teachers were provided with high-quality instructional materials and accompanying professional development. The costs for the overall Learning for Living project from which the READ Home Language Initiative emanated were approximately ZAR50 per student (about US\$3 per student). While promising, the evaluation suffered from methodological limitations since it did not sufficiently control for selection effects (Taylor, 2019).

2. ROOM TO READ

Room to Read's Literacy Program began in 2006 in South Africa and continues to be implemented. It is a school-based intervention that seeks to develop a child's reading skills and improve their reading habits in the first few years of primary school. There are two main components of the program: (i) reading and writing instruction for children in Grade 1 and Grade 2; and (ii) access to reading materials through the establishment of school libraries. For the instruction component, the program works with the Department of Basic Education to design a supplementary Home Language program using the existing curriculum and includes lesson plans, classroom materials, and comprehensive teacher training and coaching. The Room to Read model has been implemented in the Eastern Cape, Limpopo, Mpumalanga, and Gauteng provinces across 469 schools and materials have been published in all eleven official languages. Two separate impact evaluations of the program are described below.

Xitsonga-Language Literacy Program, 2014 - 2015

The Grade 1 Xitsonga literacy program was launched at 14 schools in the Bushbuckridge District in Mpumalanga during the 2014 school year and expanded to Grade 2 in those same 14 schools in 2015. This was Room to Read's first fully converged literacy program in South Africa, whereby before 2013, the reading and writing instruction component and library program component had been implemented separately in schools.

The impact evaluation employed a quasi-experimental design that included learners from the 14 schools that benefited from the Literacy Program and 14 comparison schools that did not benefit from the program. Children's reading skills were assessed using a version of the Early Grade Reading Assessment (EGRA) that was versioned into the Xitsonga language. After two years of implementation, the assessment data revealed that the program had a positive impact on the development of learners' reading skills. At the end of Grade 2, children in the Literacy Program schools made two times more progress on reading fluency and 1.7 times more progress on reading comprehension compared to children who were not benefiting from the program (Rigole & Cooper, 2016). The evaluation also found that girls outperformed boys in both project and comparison schools.

Sepedi-Language Literacy Program, 2016 - 2017

Room to Read launched a newly contextualized Literacy Program in the Sekhukhune District in Limpopo in 2016. The program targeted Grade 1 teachers in 70 project schools and expanded support to Grade 2 teachers in these same schools in 2017. A two-year impact evaluation was undertaken and included 26 schools benefiting from the program which were randomly selected from the 70 project schools and 24 comparison schools. The results showed that the Sepedi Language Program had a positive impact on improving Grade 2 learners' reading skills. Learner gains in project schools were 1.5 to 2 times higher than those in comparison schools (Rigole & Phaweni, 2018).

A key limitation of both these evaluations was the comparability between project schools and comparison schools. Project schools were not randomly assigned to the intervention group, though an effort was made to provide reasonable comparison cases by matching like with like. Despite this effort, it may be possible that comparison schools differed from treatment schools in ways that were not assessed (Rigole & Phaweni, 2018).

3. SYSTEMATIC METHOD FOR READING SUCCESS (SMRS), 2008

The SMRS was a fast-track reading proof of concept, not really a field experiment, developed around robust findings from research on learning to read collaboratively undertaken by RTI International, the then Department of Education and the Molteno Institute of Language and Literacy. The idea was to see whether reading could be improved, as a proof of concept that could stimulate further work. It was based on the premise that to read well in any language, learners should begin in their Home Language or mother tongue, learn to decode sounds into letters and words, and learn to read fluently with expression - all to learn how to comprehend what they read.

The program involved a set of 45 detailed lesson plans and was implemented over 6 months in Grade 1 classrooms in 2008/09 in ten intervention schools in each of the North West, Limpopo, and Mpumalanga provinces. The program was designed in a scripted format in the teacher's annual plan so that teachers with little preparation in reading instruction could teach it. SMRS was meant to be a supplementary introduction to a full literacy program in learners' Home Languages (isiZulu, Sepedi, and Setswana) which could easily become a 30-to-45-minute addition to the regular curriculum. Some additional reading materials were provided, but it is not clear how much training teachers received on this program and whether it was aligned with the official curriculum.

For evaluation purposes, an additional five control schools were assessed in each of the provinces. On average, only 21 out of 45 lesson plans were implemented. Despite this implementation challenge, using an early grade reading assessment (EGRA), the SMRS program was deemed a success and found extraordinarily large gains in reading outcomes in intervention schools compared to control schools (about 0.8 standard deviations (Piper, 2009)). The program increased the average letters per minute gained between the baseline and post-intervention assessment by 14.34 letters. Yet, the SMRS disappeared without a trace in South Africa (NEEDU, 2013), and the small sample size combined with the large effect sizes after a short intervention did not make it possible to provide generalizable results (Taylor, 2019), as is to be expected in a proof of concept.

4. GAUTENG PRIMARY LITERACY AND MATHEMATICS STRATEGY (GPLMS), 2010 – 2014

The Gauteng Department of Education initiated the GPLMS in 2010. Key levers of the GPLMS (Fleisch & Schoer, 2014; Fleisch, 2016) were scripted lesson plans, the provision of quality learning materials (such as multilingual mathematics textbooks, vocabulary posters, Big Books for shared reading, word cards and word lists, and alphabet charts), and instructional coaching, i.e., regular on-site visits from specialist reading coaches to observe classroom practice and offer assistance. The study sample included approximately 915

no-fee schools in Gauteng. At the height of the intervention (at the end of 2013), over 500 coaches were working on the project. Most of these coaches had experience as primary school teachers, and some had worked in teacher education. They were paid the equivalent of a school Head of Department.

Coaches visited every teacher in the program at least once a month and in several instances, twice a month. During their visits, they modelled new practices, observed, and commented on lessons, and examined students' exercise books and assessment activities. The coaches also provided 'just-in-time' training to clusters of teachers, working through the scripted lesson plans a few days before they were due to be taught. They also helped to establish small 'communities of practice' for teachers that met every month after school.

Due to the absence of a clear evaluation strategy, this yielded inconclusive findings at the end-line (Fleisch & Schoer, 2014). A somewhat better methodology (focusing only on the mathematics results) showed "positive associations" between treatment and outcomes (Fleisch, et al., 2016). The method employed here of combining lesson plans, learner resources and coaching is now considered one of a few viable improvement interventions for the primary level.

5. READING CATCH-UP PROGRAM (RCUP), 2012 - 2014

The Reading Catch-up Program (Fleisch, et al., 2017) was designed for a subset of South African school children, who were known to be behind on the grade-specific English (second language) curriculum in Grade 4. In 2011, the Gauteng Department of Education, under its Gauteng Primary Language and Mathematics Strategy (GPLMS), developed and implemented a reading remediation program in 792 underperforming primary schools in the second term of 2012. This was known as the "Catch-up Program" and was comprised of three key elements, popularly referred to as the "education triple cocktail". This includes:

- **A set of scripted lesson plans:** Teachers were provided with black-and-white lesson plan guides and assessment record books. A strict and consistent weekly teaching regimen was prescribed to be followed every week. The teaching week was divided into seven half-hour teaching periods.
- **Provision of high-quality reading material:** Classes were given four listening and teaching posters and sets of English readers intended for the early grades. Each learner received two exercise books – one to write in during the regular class time, and one specifically for assessments.
- **Onsite one-on-one instructional coaching:** The instructional coaches provided training to the teachers in small groups, and they visited the classes to model teaching practices. They observed, supported, and provided encouragement as the teachers enacted the lesson plans. The coaches also monitored and tracked teacher compliance.

The schools that were part of this initiative were instructed to suspend normal teaching of the curriculum for a term and replace it with the remedial curriculum which covered Grade 1 to 3 topics that should have been covered for English as a First Additional Language (EFAL). The remedial curriculum was recontextualized through daily scripted lesson plans covering 11 weeks.

The findings of a preliminary non-experimental evaluation in Gauteng showed positive results (focused on learner performance – assessing the extent to which the program helped improve spelling, language, comprehension and writing skills between the pre-test and post-test), but a review of the literature revealed that improvements of the magnitude and scale yielded in Gauteng were unusual (Hellman, 2012). Also, there were limitations of the internal evaluation: it was not undertaken by an independent evaluator, and it used pre-and post-tests to estimate impact without having a counterfactual (Fleisch, et al., 2017). For this to represent an important contribution to the knowledge base on educational change, the intervention needed to be replicated in a different context.

To test the efficacy and transferability of the Gauteng Catch-Up Program, a cluster randomized control trial

was used in the Pinetown District of KwaZulu-Natal (Fleisch, et al., 2017). A sample size of 40 treatment schools and 60 control schools (low-performing public schools) was deemed to be adequate. In addition to measuring the immediate impact of the intervention on average grade reading performance, data from national standardized tests (the Annual National Assessment) was used as an additional, slightly delayed measure of achievement. Even though the intervention group experienced test score gains between the pre-and post-test, the control group improved by a similar amount, implying that the intervention had no statistically significant impact on the overall reading achievement of learners.

The study highlighted a few possible measurement limitations that may have contributed to this outcome, especially concerning why there would be such a dramatic gain for control schools. First, it may simply be that soon after beginning with English as the language of instruction, which occurs in Grade 4, students typically demonstrate rapid gains in basic vocabulary. The second reason relates to the Hawthorne effect i.e., irrespective of whether a school was assigned to the treatment or control group, the very fact of being tested by an external agency might have been the reason for more engaged teaching and learning, particularly as schools became concerned about the high-stakes nature of the new national testing policy. Third, given the extremely low scores on the pre-test, concerns were raised about the possible “floor effect”, making it more difficult to identify possible learning gains at the bottom end of the distribution (Fleisch, et al., 2017).

However, the RCUP study in KwaZulu-Natal had identified two important secondary findings: (i) There was a moderately positive impact on children with a stronger initial English proficiency. This result emerged even though the program substituted the grade-level curriculum with remedial concepts that should have been covered in earlier grades. This suggests that learners lack foundational skills, hence the need to intervene before Grade 4; and (ii) the study found that the effectiveness of one-on-one instructional coaching may be dependent on the personal and professional characteristics of individual coaches.⁹ This finding complements existing research on the importance of the quality of the institutions implementing programs. In addition, the duration of coaching was too short (Fleisch, et al., 2017).

6. EARLY GRADE READING STUDY (EGRS) I, 2015 - 2017

In 2015, the Department of Basic Education initiated the first Early Grade Reading Study in collaboration with academics at the University of the Witwatersrand, the Human Sciences Research Council (HSRC), and Georgetown University (Department of Basic Education, 2018). The EGRS I compared the effectiveness of three promising systematic interventions to improve reading outcomes in learners’ Home Language, i.e., Setswana. EGRS I was implemented in Grade 1 in 2015, Grade 2 in 2016 and Grade 3 in 2017 in quintile¹⁰ 1 to 3 schools in two districts in the North West Province.

The three EGRS interventions included the following:

- A **teacher training intervention** provided teachers with lesson plans aligned to the national curriculum, as well as additional reading materials (such as graded readers for learners to read at the level of their development) and training at a centralized workshop for two days twice a year – at the start of the year and in the middle of the year.
- An **on-site teacher training and coaching intervention** provided teachers with the same set of lesson plans and reading materials as the first intervention, but also, provided ongoing support to teachers through specialist on-site coaching (monthly) and small one-day cluster training sessions at the start of each term.
- A **parental intervention** that involved weekly meetings with parents to discuss the importance of learning to read in the early grades and to empower parents with the knowledge and tools to enable them to become more involved in their child’s literacy development (only in 2015 and 2016).

9 This is under-emphasized and under-studied in the literature. The EGRA Plus study in Liberia (Piper, 2010) found a strong individual coach effect.

10 Non-fee-paying schools catering to the most disadvantaged learners

The EGRS I interventions were implemented by an organization called Class Act in 150 schools. Each intervention was implemented in a group of 50 schools with a further 80 control schools where ordinary schooling continued, with over 4,500 children in 230 schools being tracked over time. The team used a formal impact evaluation methodology, i.e., a Randomized Control Trial, complemented by a 60-classroom observation study and eight detailed case studies to understand where, how and why each intervention worked or did not work.

After two years of implementation, the ‘teacher training and coaching’ intervention emerged as the most effective. Learners who received two years of this intervention were 60 percent of a year of learning ahead of those who received no intervention (Cilliers, et al., 2020). Children in this treatment group had an average score of 43 for letter recognition compared to 39 for the control group, 30 for oral reading fluency compared to 25 and 1.5 compared to 1.2 in the control group for reading comprehension. This intervention not only improved literacy achievement in the Home Language but also improved English outcomes. This finding is in line with research that suggests that learning to read in one’s Home Language facilitates improvements in a second language.

The centralized teacher training intervention had a small positive effect, translating to approximately 30 percent of a year of learning (Cilliers, et al., 2020). Lesson observations revealed that this intervention began to shift teacher practice in non-superficial ways, i.e., more reading materials were used during the lesson and teachers attempted to implement new instructional methods, but the quality of implementation was weak and learner reading improved only marginally (Taylor, 2019). The parental involvement intervention had a small impact that was not statistically significant. One of the key challenges was about shifting parental involvement. The main aim was to ensure that parents who are not sufficiently involved in their child’s education attend the weekly meetings, but only about 30 percent of parents attended at least three sessions a year.

The coaching intervention was also found to be the most cost-effective model across the EGRS I interventions. The total costs of implementation (excluding materials development and reference group meetings – if these fixed costs will become nominal once scaled up across schools and over time) were ZAR 1.48 million for the teacher training intervention, ZAR 2.08 million for the coaching intervention and ZAR 1.1 million for the parent intervention. Since these programs were implemented in 50 schools each, and the average number of Grade 1 pupils in the sample of schools at the start of the program was 75, the per-pupil costs are ZAR 397 (US\$ 30.58), ZAR 557 (US\$ 42.91), and ZAR 295 (US\$ 22.75) respectively. The Coaching intervention was most cost-effective with a 0.57 standard deviation increase for US\$ 100 spent per pupil per year, compared to 0.39 and 0.50 standard deviation increase per US\$ 100 spent per pupil per year for the training and parent interventions, respectively.

A follow-up data collection (sustainability results) one year after the intervention had ended found that the impacts on the original cohorts for the teacher interventions persisted into Grade 4. Moreover, there was evidence of sustained change in teaching practices one year later – leading to improved learning outcomes for the next cohort of learners. In summary, the sustainability results revealed the following:

- The combination of lesson plans, integrated materials and professional support had a sustained impact on learning – no evidence of fade-out or compounding and positively sustained spillovers to English.
- Some evidence of positive spillovers to new teachers who were not previously exposed to the program.
- Sustained change in teaching practice is only significant for the coaching intervention.
- Cost-effectiveness of both the teacher training and coaching interventions increased by roughly 50 percent when also including learning gains for the second cohort of students.

It is important to note that none of the EGRS I interventions had a significant impact on reading outcomes for children in schools located in deep rural areas. The most likely barriers to the impact on reading outcomes

(based on monitoring data collected by the service provider) include lost teaching time and coach contact time due to a combination of factors such as teacher absenteeism; and disruptions to schooling including poor weather conditions, memorial services, protest action and specific extra-mural activities such as choir practice. Taken together, the EGRS I interventions illustrate how challenging it is to shift reading outcomes at some level of scale (Taylor, 2019).

In response to the findings and recommendations emerging from the EGRS I, the Department of Basic Education developed an Improvement Plan which has been endorsed by Cabinet, intending to institutionalize successful elements through the EGRS project. Some of these key elements include adopting a structured learning program that uses daily lesson plans which incorporate key reading materials as a means of implementing the curriculum; developing guidelines for on-site coaching; and further research in terms of developing benchmarks for reading in African languages and assessing the cost-effectiveness of using different modalities of teacher support.

7. READING SUPPORT PROJECT (RSP), 2019 - 2020

The Reading Support Project (RSP) was a four-year cooperative agreement between USAID and an organization called Foundations for Professional Development (USAID, 2021). The first phase undertaken with the Department of Basic Education involved a pilot around system strengthening interventions in 2017-2018. Challenges experienced during the pilot necessitated a review of design, which resulted in phase 2 of RSP, incorporating evidence-based recommendations from EGRS. RSP focused on improving the teaching practices concerning reading for Grade 1 to 3 in Setswana Home Language and English First Additional Language (EFAL) teachers at the same time. It sought to improve subject matter knowledge, promote more effective pedagogic practices, improve in-classroom time management, increase the effective use of Learning and Teaching Support Materials (LTSMs), and foster a school environment that supports teachers' ability to implement the full curriculum and facilitate successful teaching and learning. RSP was funded by USAID and was implemented over two years (2019 – 2020) by the Foundation for Professional Development, the Molteno Institute of Language and Literacy, Oxford University Press of South Africa, and Voluntary Services Overseas.

The RSP was implemented in 263 schools in the same two districts as the EGRS I (Dr Kenneth Kaunda and Ngaka Modiri Molema), targeting all quintile 1 – 3 Setswana language of learning and teaching schools, and is taking place simultaneously in all three grades in the Foundation Phase. It is intended to be a scale-up of the Department of Basic Education-initiated EGRS I.

There are six focus areas for RSP and since it was set up as a Randomized Control Trial, the selected schools did not benefit from all of these areas (USAID, 2019):

- Professional development of curriculum advisors in two participating districts.
- Developing leadership capacity of school principals/deputy principals and Heads of Departments to promote a culture of reading in their schools (65 schools).
- Quarterly 'just-in-time' training for teachers from all 236 schools on the implementation of the Curriculum and Assessment Policy Statement and lesson plans.
- The provision of 14 literacy coaches to 140 schools to offer classroom-based support for Foundation Phase teachers.
- The provision of learning and teaching support material packages to all 236 schools.
- Classroom libraries provided to 100 schools through the Department of Basic Education.

The 236 schools are divided into three separate groups, i.e., two intervention groups and a control group:

- **Intervention 1** implemented in 127 schools. These schools receive learning and teaching support material packages, teacher training, coaching, and training of School Management Teams.
- **Intervention 2** implemented in 71 schools, is the same as intervention 1 with the only difference being no training of School Management Teams. These 71 schools receive the learning and teaching support materials package, teacher training and coaching.
- **Control group** with 65 schools receive the 'base package' of learning and teaching support materials and teacher training.

Among the key lessons learnt during implementation are that Professional Learning Communities (PLCs), if implemented well, can be a powerful strategy for professional development at all levels of the system. The training of coaches needs to go beyond content mastery and needs to provide coaches with the knowledge and skills required to support teachers in various contexts. Teachers are also at different levels of development and may require tailored support. Findings indicate that the RSP experienced challenges with weak implementation, some of which include concerns with the quality of coaching where coaching visits did not take place as often as they should have, and delays in the delivery of materials. Attendance of principals at PLCs was erratic due to their work commitments. Adaptations to the project were also required due to the ongoing COVID-19 pandemic (USAID, 2021). Concerns were raised around the procurement of the overall project.

8. EARLY GRADE READING STUDY (EGRS) II, 2017 - 2019

The second Early Grade Reading Study started in 2017 and sought to provide support to teachers in the Foundation Phase in teaching English as a First Additional Language (EFAL) since most learners need to learn in English from Grade 4. The possible scaling-up of the EGRS I model raised questions about the financial viability of rolling out system-wide instructional coaching, as well as the feasibility of recruiting, training, and managing large cohorts of coaches required for an entire school system (Department of Basic Education, 2017).

To test the cost and resource alternatives to on-site coaching, EGRS II was implemented in two districts in the Mpumalanga Province through a consortium between Class Act and Molteno. The EGRS II interventions provided teachers with additional reading materials and a structured learning program aligned to the CAPS curriculum but differ concerning how training and support are provided.

The two EGRS II interventions included the following:

- **Intervention 1:** Provided teachers with regular face-to-face coaching (once a month in schools) and quarterly training workshops. Three expert reading coaches were employed to support 50 schools in total, resulting in a teacher-to-coach ratio of 1:32 teachers in 16 schools. The training provided was best understood as 'just-in-time' training on how to implement the EFAL curriculum in the upcoming weeks. The reading coaches played distinct and overlapping roles, including modelling new practices and monitoring implementation fidelity. The coaches also initiated needs-driven clustered workshops throughout the school term with identified teachers invited to attend. Teachers were provided with a set of Learning and Teaching Support Materials (LTSMs) including graded reader booklets, posters, big books, sentence strips and vocabulary words.
- **Intervention 2:** Used a different model of teacher support and mode of delivering the lesson plan. This technology-supplemented intervention used electronically available lesson plans and interactive support platforms that were available all the time to the teacher. The application further included resources such as video clips on best practices, audio clips of phonic sounds, and songs and rhymes in the lesson plans. The intervention made use of WhatsApp/SMS to create a virtual coaching practice and virtual

communities of practice. The virtual reading coach made use of text messaging to communicate with teachers, providing them with reading tips weekly, and answering any questions on the lessons they had taught or were teaching the next day.

- There was only one reading coach for 50 schools, based in an off-site office. Unlike an on-site coach who supports fewer numbers of teachers in schools located close to each other, the virtual coach supported all the teachers in all the schools in the treatment arm though they never visit a school nor were they able to directly observe a teacher in action. That is, 50 schools across two districts within the province of Mpumalanga were supported by a single resource. The virtual coach supported an average of 85 teachers per year in a single grade. Moreover, unlike the on-site coach, they were not necessarily in the same province as the schools and conduct their everyday coaching from the Service Provider's head office (Department of Basic Education, 2019b).

These interventions were implemented over three years, targeting Grade 1 teachers in the first year, Grade 2 teachers in the second year etc. A random sample of 20 Grade 1 learners were assessed at the start of the program in February 2017. The same cohort of learners were tracked over three years and were assessed at the end of every school year. Their teachers were surveyed every year, and a classroom observation was undertaken in a subset of schools at the end of the third year.

The main findings from experimentally comparing on-site coaching and virtual coaching of teachers are the following (Cilliers, et al., 2020):

- After three years of implementation, the on-site coaching intervention improved English oral language proficiency (0.31 standard deviations) and English reading proficiency (0.13 standard deviations), in contrast to the virtual coaching intervention which improved English oral language proficiency (0.12 standard deviations). The virtual coaching was far less effective than on-site coaching and had no statistically significant impact on English reading proficiency.
- Virtual coaching had an unintended negative effect on Home Language literacy, caused by a reallocation of time from Home Language instruction to English. While teachers in both the on-site coaching and virtual coaching interventions dedicated less time to Home Language instruction, it was more pronounced for teachers in the virtual coaching intervention.
- Teachers in the on-site coaching group were more effective at implementing activities that required individual attention for learners and higher-order pedagogical skills such as group guided reading and independent reading.
- A critical difference between the on-site coaching and virtual coaching interventions was the nature of the coaching interaction, and the direct observation and opportunities for feedback from an on-site coach were critical to program success.

The cost estimates indicate that the per-student costs of on-site coaching are US\$ 66 per year and US\$ 53 per year for virtual coaching (Cilliers, et al., 2020). These estimates excluded costs involved in developing and piloting the interventions and should provide realistic estimates if the models are to be scaled up. The on-site coaching model cost US\$ 2,747 to support a teacher per year and US\$ 2,131 for them to be supported through the virtual coaching model (Cilliers, et al., 2020). While the on-site coaching model was 23 percent more expensive than the virtual coaching intervention, it had a larger impact on learning outcomes and was more cost-effective. The main cost component for the on-site coaching model was the salary cost of the reading coaches, while the main cost drivers for the virtual coaching model were the additional night of residential training, tablets, and cellular data for teachers.

Extension of EGRS

There is one extension of the EGRS interventions currently underway. This intervention, supported by the Hempel Foundation and UNICEF, seeks to implement programmatic elements of EGRS on a larger

scale, including innovations to ensure the cost-effectiveness and sustainability of the proposed models, and establishing how to create and sustain improvements in teaching practices. The project is being implemented in different districts in the North West province, to cover the entire district with a basic package of support. Some of the selected schools are receiving more intensive on-site coaching (a higher dosage), whereas other schools are being exposed to a phased approach, starting with traditional coaching, moving on to developing a handover plan for Heads of Departments with the coach being used to catalyze communities of practice, and shifting towards providing more light-touch support using innovative technologies.

9. FUNDA WANDE COACHING INTERVENTION, 2019 - 2022

Funda Wandé (Funda Wandé, 2019) is a not-for-profit organization that aims to equip teachers to teach reading for meaning in Grade R – 3 in South African schools. It has built on lessons learnt from previous interventions to specifically design a course to teach reading for meaning in South Africa. The *Advanced Certificate in Foundation Phase Literacy* was developed and offered at Rhodes University. This is a two-year part-time course that trains Foundation Phase teachers on how to teach reading for meaning in African languages. It is a high-quality, multi-media and open-access course which uses professionally filmed in-classroom video, infographics, and other multimedia to teach the major components of literacy and numeracy. In addition to the course, Funda Wandé provides ongoing coaching for teachers. The in-service teacher training model used builds on the DBE's EGRS model which demonstrated the efficacy of using on-site coaching.

The first Funda Wandé Pilot, or the Coaching Intervention, was launched in 2019 and implemented in 30 isiXhosa Home Language schools across three districts in the Eastern Cape province. The aim of the pilot was to determine the scalable cost-per-learner and evaluate the impact on learning outcomes. The program was evaluated using a Randomized Control Trial, with 30 treatment (Funda Wandé) and 30 control schools (Ardington & Meiring, 2020).

The intervention comprised of the following essential components (Ardington & Meiring, 2020):

- **In-classroom coaching and support:** Coaches are experienced isiXhosa Home Language foundation phase teachers. For every five schools, there is one coach who will visit teachers weekly for two years. Coaches visit each school for an average of three times a month. The coaches observe the Foundation Phase teachers in the classroom and provide targeted advice on how to improve their teaching practices, as well as provide model lessons to the children in these classrooms.
- **Learner and Teacher Support Materials (LTSMs):** Each teacher received an LTSM box with a set of Funda Wandé materials, readers, and additional Graded reading aides, including posters and phonics flashcards aligned to the lesson plans. One innovation was to convert the separate “skinny books” of graded readers into anthologies with 24 stories per book. Through collaboration with the Eastern Cape Department of Education, the province printed 824,345 isiXhosa and Sesotho anthologies, enough for every Grade 1, 2 and 3 children in the province - fully at the Department's expense. These were distributed and used in 2019 and have again been printed and distributed for 2020 (Funda Wandé, 2019). The Funda Wandé materials for teachers include structured lesson plans which provide a day-by-day guide on how to teach reading for meaning, using the resources in the Funda Wandé box; handwriting booklets; baseline assessment booklets; group-guided reading booklets; online resources for teachers and a pre-loaded flash drive with the full set of Funda Wandé videos and multimedia resources. All materials are aligned to the DBE Curriculum and Assessment Policy Statement (CAPS) curriculum. The lesson plans are in full color and have one double-page spread per day with photographs of key materials and corresponding guidelines on how to use them.
- Funda Wandé materials are all Creative Commons licensed. Therefore, the Government could easily adopt them and print them at scale without incurring royalties or unnecessary costs. The once-off production costs are borne by the respective donors, lowering the overall cost of the development

and adoption of new materials and new methods of providing teachers and learners with meaningful learning opportunities.

- **Training:** Teacher training is comprised of on-site phase meetings once a week and occasional off-site workshops which allow teachers to collectively work on a particular issue and plan for upcoming terms. Training is made up of whole phase meetings that take place after school (about three per year) and one-on-one in-classroom visits with each teacher in the Foundation Phase which takes place at least once per term.
- **Head of Department (HoD) training:** Once the intervention is complete, HoDs are capacitated to take over the role of the literacy coach. To this end, all Foundation Phase HoDs have been given a bursary by Funda Wandé to enroll in the two-year part-time “Advanced Certificate in Teaching Foundation Phase Literacy” at Rhodes University. The training also includes off-site work with professional learning communities (PLCs).

Midline results reveal that the intervention has slightly larger effects than the EGRS interventions. The midline results after one year of intervention translate to between 20 and 27 percent of a year’s worth of learning for Grade 2 learners, and between 33 and 58 percent of a year’s learning for Grade 1 learners compared to control schools. Further, the program effects are positive across all sub-tasks for all the sub-domains of reading proficiency which could reliably be measured (Ardington & Meiring, 2020). The scope of the program has been extended to include a numeracy component, i.e., Bala Wandé: Calculating with Confidence. Given that all Foundation Phase teachers teach both literacy and numeracy, the coaches will now provide support for these subjects. The Bala Wandé intervention began in 2020 in Grade 1 and will expand to Grade 2 and Grade 3 in 2021 and 2022, respectively.

10. FUNDA WANDE TEACHER ASSISTANT AND LEARNER WORKBOOK INTERVENTION, 2021 - 2023

Funda Wandé has put together a core set of Funda Wandé (literacy) and Bala Wandé (numeracy) LTSMs for the foundation phase. These materials were developed based on previous research and interventions. Given the high youth unemployment rate in the Limpopo province, this intervention seeks to utilize this untapped potential by effectively selecting, training and supporting matriculants to assist teachers within a structured learning program to improve early literacy and numeracy outcomes (Ardington & Henry, 2021). The impact evaluation used a Randomized Control Trial to test the importance of teacher assistants with 120 no-fee schools in the Capricorn North and Capricorn South Districts.

There are three intervention arms under the project with 40 schools each (80 intervention schools and 40 control schools). All intervention schools receive the basic package of LTSMs, and teacher, HOD and Subject Advisor Training. In addition, half of these intervention schools also receive one teacher assistant per teacher to provide support on the use of the LTSMs. The program began with Grade 1 learners in 2021 and will then expand to include Grade 2 learners in 2022 and Grade 3 learners in 2023.

LTSMs include (i) activity workbooks for each learner, (ii) teacher guides aligned to learner workbooks that provide explanations to teachers on what they need to teach and how, and (iii) classroom materials including readers, posters, phonics flashcards for literacy and manipulatives, models of shares and measuring instruments for numeracy. Materials also include a series of videos aligned to teacher guides. These videos are zero-rated on most South African network providers and can be accessed by teachers on their mobile phones at no cost. They are also freely available on YouTube. Teachers receive centralized training by Funda Wandé on the use of the LTSMs. These pieces of training take place at the beginning of each quarter and are four days each (Ardington & Henry, 2021).

A total of 145 teacher assistants (TAs) were hired for the intervention. Their role is to help teachers with classroom management and to increase the frequency of small group and one-on-one teaching. Teacher assistants receive a stipend of ZAR3,760 per month and are paid by the government through the

Presidentially endorsed Youth Employment Services (YES) fund. They receive two months of initial training to ensure that they are equipped to support teachers with administrative tasks, handling LTSMs, identifying and supporting learners in need, and doing remedial exercises with learners in small groups. After this initial training, assistants receive four days of training per quarter and are periodically visited by a mentor during classes, however, this has been interrupted due to the COVID-19 pandemic (Ardington & Henry, 2021).

In comparison to other programs, such as the DBE’s EGRS and the Funda Wandé Coaching Intervention, the midline evaluation results found that the provision of Funda Wandé selected, trained, and supported teacher assistants to Grade 1 classrooms has been highly effective in improving foundational reading (Sepedi) and mathematics skills, particularly given the limited exposure children had due to the COVID-19 pandemic (Ardington & Henry, 2021). The impact on reading outcomes after one year was 110 percent of a year of learning (Spaull, 2022). Children in the LTSM and TA group get 17.7 letter sounds correct per minute compared to 15.1 in the only LTSM group and 14.6 in the control group. Children in the LTSM and TA group further score an average of 5.9 in oral reading fluency compared to 2.5 for the control group.

11. STORY POWERED SCHOOLS – NAL’IBALI, 2016 - 2019

While not the typical structured learning programs discussed above, Story Powered Schools (SPS): A South African Reading Revolution, is an innovative intervention aimed to develop and sustain a culture of reading for enjoyment in 720 primary schools in the Eastern Cape and KwaZulu-Natal provinces (Menendez & Ardington, 2018). The SPS program is part of the broader Nal’ibali (isiXhosa for “here’s the story”) campaign, which is a national reading-for-enjoyment campaign to spark children’s potential by making reading and storytelling part of their daily lives. Equally important interventions supported under this campaign include the promotion and support of school and community reading clubs, and monthly reading supplements of stories published in leading newspapers countrywide, all anchored by a volunteer network of literacy activities called Funda Leaders. SPS was externally evaluated using a Randomized Control Trial (RCT) to assess the causal impact of SPS on reading outcomes of primary school children.

The SPS project focuses on nurturing a love of reading in mother-tongue languages and English and is run by Nal’ibali, in partnership with USAID, the DG Murray Trust and national, provincial, and local education departments. The campaign is based on research on the link between reading for pleasure and improved education outcomes. Its activities aim to increase: 1) awareness about the importance of reading for enjoyment to contribute to children’s literacy development, and learning; 2) motivation to read, write, and share stories; 3) positive behaviors and habits that support reading development; 4) access to reading materials; 5) children’s skills and confidence relating to reading, writing, and storytelling; and 6) parents’ and communities’ involvement in promoting reading.

The main activities take place at each SPS school (Ardington, et al., 2019):

- **“Big 5” training:** Five teachers are trained for two days on reading for enjoyment using the Nal’ibali approach.
- **Community training** for ten community volunteers in reading for enjoyment using the Nal’ibali approach.
- **Providing five hanging libraries:** large hanging bags with book pockets to display the reading materials and 15 editions per year of the bilingual Nal’ibali reading supplement, a bilingual newspaper supplement with stories, literacy activities, featuring people working with Nal’ibali, reading tips and support to inspire and guide caregivers, teachers, and others to make reading and storytelling meaningful, enjoyable, and accessible.
- **Weekly school visits from Story Sparkers:** Nal’ibali mentors. Story Sparkers are young high school graduates from the community in which the school is located. They are recruited and employed by Nal’ibali. They receive training and are supported in the field by SPS Literacy Mentors and Provincial

Coordinators. On their weekly visit, Story Sparkers assist schools in creating a culture of reading for enjoyment with activities scheduled before, during and after the school day. Typically, their weekly activities include assisting in setting up and running reading clubs, running reading for enjoyment activities in school assembly, demonstrating the creative use of reading resources, and demonstrating how to effectively use the mandated “Drop Everything and Read”¹¹ periods. Along with other activities such as holiday clubs and book showcase days.

- **Holiday programs** during the mid-year break include multiple reading activities for learners.
- **Events, campaigns and competitions** to engage the broader school community.
- **Reading club showcases** competitions where children from reading clubs are adjudicated based on some criteria and share and perform their achievements.

An RCT is used for the impact evaluation, with communities of schools randomly assigned to treatment and control groups. In each school, one teacher was randomly sampled from each of Grades 2, 3 and 4. Learners were randomly selected from the classes of sampled teachers. The endline evaluation found that SPS did not have an impact on learners’ reading and writing skills in their mother tongue or English (Ardington, et al., 2019). The evaluation did find that while overall take-up and adherence to SPS is low, with program activities not taking place as expected, 15 percent of learners in SPS schools attending Nal’ibali reading clubs, and in the Eastern Cape, these participants had higher reading fluency and did much better on oral reading and productive listening comprehension tasks (Ardington, et al., 2019).

RECENT POLICY AND PROGRAMMATIC SHIFTS IN SUPPORT OF EARLY GRADE LITERACY OUTCOMES

In recent years, the DBE, and in several instances, in collaboration with the National Education Collaboration Trust (NECT), have initiated programs, campaigns and policy shifts to strengthen early grade reading outcomes in South Africa. While this is a commendable effort, there are still challenges when it comes to moving from evidence-based research to program implementation.

1. THE ROLE OF THE NATIONAL EDUCATION COLLABORATION TRUST (NECT)

The National Education Collaboration Trust (NECT) is an organization dedicated to strengthening partnerships between government and civil society to achieve South Africa’s national goals for improving outcomes in the Basic Education sector. The NECT’s mandate is set out in the Education Collaboration Framework (2013) which was a plan produced through consultations among key stakeholders in response to the government’s call for collaboration with civil society and has the full support of the Department of Basic Education (DBE). The NECT is a registered trust and is overseen by a board of trustees drawn from business, government, education, trade unions and civil society more broadly.

The NECT channels its efforts through six themes for collaboration, which include: (i) professionalization of the teaching service; (ii) supporting courageous leadership; (iii) improving the government’s capacity to deliver; (iv) improving the resourcing of education; (v) involving parents and communities in education; and (vii) enhancing support for learners and promoting their well-being.

The District Improvement Program, which is the backbone of the NECT, aims to improve the quality of teaching, learning and management of schools as well as the effectiveness of the support and monitoring

services provided to schools by districts. The program is currently being implemented in several districts across five provinces, i.e., the Eastern Cape, KwaZulu-Natal, Limpopo, the North West, and Mpumalanga. The NECT’s teacher development strategy focuses on supporting teachers to effectively deliver the CAPS curriculum for Mathematics, Science and Languages. This is done through standardized and routine training which takes place every quarter and resources such as teacher support toolkits, planners and trackers, and lesson plans. Capacity building also takes place for subject advisors and circuit managers, with the view to supporting schools. Essentially, the NECT adopts a cascade model of training, whereby subject advisors are trained by lead trainers who in turn train teachers in their respective districts. The model aims to reach many teachers and learners; however, one could argue that the approach is quite light touch (given the emerging evidence from other programs), and more needs to be done for the program to have the intended systemic approach. The NECT programs have not been rigorously evaluated, making it challenging to unpack the impact on learning outcomes.

2. INTEGRATED SECTOR PROGRAM ON READING, 2019 – 2024

In responding to the early grade reading challenges, the DBE has developed an Integrated Sector Program on Reading, using the Primary School Reading Improvement Programme (PSRIP) (discussed below) as an overarching program. The main aim of the sector program is to capacitate and upskill teachers in teaching reading in all languages and ultimately to improve the literacy and reading outcomes of learners in the Foundation Phase and Intermediate Phase. The integrated sector program is designed to improve literacy and reading outcomes in Grades 1 – 6 and aims to roll out a nationally integrated package to support the teaching of reading by 2024. It seeks to do this, by leveraging the successes, resources, and momentum of already existing programs in the purview of the Department under a single coordinated strategy and reporting focus.

The sub-programs in the integrated sector reading program include the following:

- **PSRIP – English as a First Additional Language (EFAL):** Designed to improve literacy and reading outcomes in Grades 1 – 6 through training subject advisors, school management teams and teachers associated with the teaching of EFAL in these grades. Through PSRIP, teachers are trained to understand how the program interprets and implements the Curriculum and Assessment Policy Statement (CAPS) curriculum in terms of time allocation, pedagogy, and assessment.
- **Early Grade Reading Assessment (EGRA):** A diagnostic reading assessment that is currently being implemented in Grades 1 – 3 in 8,000 schools nationally in 9 African languages.
- **Early Grade Reading Study (EGRS):** Scale up the package of lesson plans, and additional LTSMs including graded readers and variations of coaching to institutionalize evidence-based support for reading in the Foundation Phase.
- **National Reading Coalition:** Seeks to coordinate and accelerate all existing reading initiatives for the next 12 years towards the 2030 National Development Plan (NDP) targets.
- **Read to Lead Campaign:** Aims to create a national focus to improve the reading abilities of all South African children.

The different strands identified to improve reading outcomes under the sector program include (i) strengthening the capacity of the sector; (ii) teacher development and support; (iii) direct learner support; (iv) parent and community support mobilization; (v) provisioning and utilization of learning and teaching support materials (LTSMs); (vi) tracking learner performance and reading outcomes; (vii) research, monitoring, evaluation, and reporting; (viii) partnerships; and (ix) advocacy and communication. While the program has been adopted by the Council of Education Ministers, this does not imply that separate budgets have been allocated for its implementation.

11 This is part of the DBE’s Read to Lead campaign. All schools should observe at least 30 minutes per week of mandatory reading.

Detailed descriptions of some of the key components of the integrated sector reading program are documented below:

Primary School Reading Improvement Program (PSRIP), 2016 – 2019

The DBE, in collaboration with the NECT, designed a national reading program in support of the sector skills plan of the Education Training and Development Practices Sector and Training Authority (ETDP SETA) and the strategies of the DBE (NECT, 2019).

The first phase of PSRIP focused on improving reading outcomes for EFAL through structured training support, materials provision, and classroom support in Grades 1 to 3 in 1670 primary schools in select districts across the country. The program aimed to build the capacity of teachers and HoDs and develop the capacity of Subject Advisors to support teachers. The second phase of PSRIP focused on both Foundation Phase teachers and Intermediate Phase teachers in a larger sample of schools, approximately 2151 schools were estimated in the 2019 PSRIP evaluation. Key elements of the program include the following:

- **Materials provision** such as lesson plans, curriculum trackers, posters, word cards, assessment materials and big reading books.
- **Subject advisor training** focuses on an orientation around a Foundation Phase EFAL Reading Toolkit, reflections on implementation issues and building a deeper understanding of core methodologies and routines to teach reading and disrupting traditional teaching practices. Note, subject advisors were central to the success of the program and work under the coordination of provincial coordinators (one per province) and on average, supported about 40 teachers each and school management teams. Across the country, 140 Foundation Phase and 140 Intermediate Phase Subject Advisors are supported.
- Following subject advisor training, **teachers were trained** by subject advisors at the District level. Subject advisors also provided teachers with classroom-based support.
- Learners were then assessed using the Early Grade Reading and Assessment (EGRA) tool.

Two external evaluations were commissioned for the 2017 phase (Africa Strategic Research Corporation, 2017) and again for the 2019 phase (Africa Strategic Research Corporation, 2019). Both evaluations used a pre-and post-test quantitative method for estimating learner reading outcomes, though 2017 undertook a classroom observation component to assess teacher pedagogy changes. Findings from evaluations echoed the impact results seen in the EGRS studies, in that intervention learners scored higher on the Decoding and Oral Reading Fluency than control schools, but minimal impact was observed for the lowest-performing learners, particularly those from rural schools. Secondly, even less difference was seen in learners' abilities to successfully show comprehension with intervention schools answering one question more correct than control. Finally, encouraging shifts were observed in the classroom practices of teachers, making a further case for the need to invest in sustained, holistic support to teachers (Department of Basic Education, 2018).

National Reading Coalition (NRC), 2019

The National Reading Coalition was established by the NECT and the DBE as a comprehensive national response to the reading challenges facing South Africa. It is essentially a coordinating structure that aims to serve as an umbrella where all reading initiatives and interested stakeholders come together to share knowledge and successful learning experiences. The NRC is also in the process of coordinating the development and implementation of a National Reading Improvement Strategy.

The NRC seeks to improve reading by implementing activities around six value chain areas, i.e., research, policy, teacher preparation, community support, access to reading resources, and continuous professional development. At this stage, no conclusions can be made about the effectiveness of the coalition, given the challenges experienced in coordinating many stakeholders in the sector.

Read to Lead Campaign, 2015

Similar in impetus to its predecessor campaign, the Read to Lead initiative has been a national attempt to coordinate activities around making reading a priority at all levels in schools. Described as a communal approach to installing a love of reading, it calls on a variety of stakeholders (including those outside the classroom) to help create a culture of reading in children's lives (Department of Basic Education, 2021). Interventions in the classroom to improve this has consisted of expanded school library access and fundraising to install 1000 more libraries in schools. In the "Drop All and Read" initiative where "schools have been advised through a circular to observe at least 30 minutes per week of mandatory reading as part of this programme. Beyond the reading at schools, we [DBE] are encouraging families, churches, and communities to reinforce the Drop All and Read Campaign at home and various community engagements," (Department of Basic Education, 2021).

Furthermore, the campaign has actively prompted the establishment of book clubs at schools (ones that are not just for learners but for teachers and school leaders too), promoted participation in local and national spelling bee competitions and where possible, encouraged schools to undertake regular book collection drives for schools in the area. The campaign has also prioritized communication to parents, caregivers, community, and religious leaders on what they can do to actively promote reading in their children's lives. Resources and tips are published on the national DBE website as well as on provincial education sites, though how often these are updated is not readily clear.

3. NATIONAL FRAMEWORK FOR TEACHING READING IN AFRICAN LANGUAGES IN THE FOUNDATION PHASE, 2020

The National Framework for Teaching Reading in African Languages (Department of Basic Education, 2020) aims to improve early reading instruction in African Languages by unpacking and mediating the core reading components, namely, decoding, comprehension and reader response which underpins the teaching of reading in the early grades.

The Framework seeks to highlight the general cognitive development that is required for all learners to learn to read, and how teachers should teach reading effectively in African languages, considering their specific linguistic and orthographic features. It is presented in a way that informs the teacher on what each component is, why it is important, when to teach it, how to teach it, what resources should be used and how to identify when learners are experiencing specific barriers. It also reinforces the core reading methodologies that underpin reading instruction in the early grades, i.e., reading aloud, shared reading, group guided reading, paired and independent reading. The framework also outlines enabling factors that support reading such as the provision of core reading materials, teacher training and support, and parental and community involvement.

4. READING BENCHMARKS IN AFRICAN LANGUAGES

One strategy to improve reading fluency is teaching children in their Home Language. The World Bank refers to the Home Language of children as the language which is most familiar to them. This is usually their mother tongue or other vernacular which may be a *lingua franca* used by the community. Globally, the language in which children are instructed in early grades is one of the most important inputs into the education production function. Local and international evidence has shown that it is best if a child first learns to read in their Home Language and then learns to read in another language. The rationale behind this approach is that children find it easier to learn to read in a second language if they are literate in their Home Language (Spaull, 2016), as decoding skills transfer to some degree, depending on various factors. The knowledge of a language and the existing lexicon of oral vocabulary can serve as a solid foundation for learning to read when the language used to teach reading is the same as the child's Home Language (World Bank, 2018).

An important benchmark of reading is reading fluency, i.e., children need to be able to read quickly enough to understand what they are reading (Spaull, et al., 2018). It reflects the speed and accuracy that learners read with when reading a text aloud. These reading benchmarks are important because they tell us if a child is ‘on track’ when they are learning to read; and by measuring each of the different benchmarks, it is possible to see if there is any progress over time. Research has shown a strong association between reading fluency and reading comprehension (Spear-Swerling, 2006). The benchmarks that exist internationally are largely for languages such as English, French, or Spanish. Unfortunately, these benchmarks cannot be used for African languages since different languages have different language structures, which means that sounds, words, and meanings are consolidated in different ways.

In 2019, the Department of Basic Education, in collaboration with USAID, South African academics, reading practitioners, and international benchmarking experts, began exploring the feasibility of developing reading benchmarks in African Languages in South Africa. The design report (USAID, 2020) highlights the following key elements which need to be considered for successful benchmarking: (i) identify the range of competencies that can be benchmarked, for example, oral reading fluency, sound-letter recognition, reading comprehension, complex consonant sequences and reading accuracy; (ii) accuracy and fluency benchmarks could be set for language families; (iii) comprehension benchmarks could be set across languages; (iv) alignment with the National Curriculum Statement (NCS) Grade R to 12 and the Curriculum and Assessment Policy Statements (CAPS) for the Foundation Phase; (v) ensuring stakeholder involvement and buy-in; and (vi) communicating benchmarks in a way that makes it useful for parents, teachers, schools and policymakers.

Benchmarks and thresholds for foundational early grade reading skills that are necessary (albeit not sufficient) to read for meaning in Nguni languages (isiZulu, isiXhosa, and siSwati) have been established in South Africa (Ardington, et al., 2020). Multiple and comparative assessment data points were used for nearly 16,400 unique learners in the early grades. Through rigorous analysis of empirical regularities and reading trajectories across the data, the following context-sensitive benchmarks and thresholds were identified for the Nguni languages: a letter-sounds benchmark at the end of Grade 1 of 40 letter sounds per minute; a lower fluency threshold at the end of Grade 2 of 20 correct words per minute and a fluency benchmark at the end of Grade 3 of 35 correct words per minute (Ardington, et al., 2020).

The development of reading benchmarks in English as a First Additional Language (EFAL) and Setswana Home Language is currently underway. The next step would be to develop benchmarks for the Sotho-Tswana language group for which there is a seemingly good amount of data available. Benchmarks for Setswana are already being developed, with the remaining two languages in this group being Sepedi and Sesotho. Developing benchmarks in the remaining languages, i.e., isiNdebele, Afrikaans, Xitsonga, and Tshivenda will require significant investment since no readily available data can be used to set these benchmarks.

CONCLUSION AND POSSIBLE NEXT STEPS

This policy paper presents a synthesis of previous and existing early grade reading models in South Africa as an initial first step to stimulate dialogue on how to take early grade reading to scale. The aim is to build an understanding of what we have collectively learned from early grade reading programs that have been implemented in South Africa, start thinking about options to scale up successful programs in a fiscally sustainable manner and advocate for regularly measuring reading fluency and comprehension of young learners. The note does not document every detail of each of the programs and there are some gaps in the analysis, but these are largely attributed to the lack of reporting and information available in the public domain. This includes details around dosages of support, and the use of internal versus external capacity, with a clear gap being the lack of costing data for programs and interventions. A more nuanced analysis is required to join the dots between these programs and initiatives with the current system, but this is beyond the scope of this paper.

While structured pedagogical approaches with tightly integrated inputs are proving to have the strongest gains in early grade reading outcomes, a core challenge for the sector is how to transition from operational research to program implementation. Even though the national and provincial levels of government are either the leading partners or close contributors to the design and implementation of several successful interventions, these interventions are currently medium-scale pilots or experiments that are largely financed and implemented by external parties. At present, the learnings, challenges, and successes of interventions have remained closely linked to their implementers/funders, and how these have influenced curriculum standards, teaching plans, and assessments is less clear. One needs to consider what an appropriate mix needs to be between pilots/experiments/campaigns versus routine implementation.

There is also a need for more collaborative effort and discussions around the intense awareness of the problem and emerging solutions; how well the lessons from successful interventions are being accounted for; the dialogue between national and provincial spheres of government in regularizing lessons; popularizing these lessons to mid and school-levels; and if lessons are emerging, at what point do they become the normal way of delivering the curriculum.

As noted in the Executive Summary, it is a bit puzzling that South Africa keeps trying so many things, usually recycling more or less similar inputs or “vectors”, often trying new “vectors” or processes that had been shown to be weak in previous experiments as long as 10 or 20 years before a given one is tried again. And, also, that no way has been discovered, yet, to incorporate good practices into the normal, every-day efforts of the education systems in a way that is un-branded, not a campaign or special push with an acronym, but just the way things are done. This puzzle, however, is researchable. In these concluding paragraphs we note how one could research the issue.

Please note that some of the work involved in these steps could well be done under the auspices of some other existing effort, such as the National Reading Coalition (NRC). It is possible, also, that an existing institution such as the DBE itself or others could manage the bureaucracy of the process. Someone would have to fund the work, as it is unlikely that the right persons would have the time to do the work pro bono. It is not an insubstantial amount of work.

It is possible that a set of qualitative research techniques could be deployed to get a clear answer to this puzzle. The following suggestions could be changed, re-arranged, sequenced differently, etc. But something similar to what is suggested here might be useful to chart the way forward.

1. Appoint a small 3-person or 5-person committee of equal experts but with a strong lead (*primus inter pares*) able to devote significant amounts of time to the task. The other persons could do pieces of the work that the lead is mainly tasked with, but their main role would be to validate, critique, nuance, and shape the propositional work of the lead. That is, react to the lead’s propositions and approaches, and

discuss until there is convergence. The purpose of the research would be to explore a set of implementation research questions, which may be easier to express as propositions that exemplify opinions key actors may have. These questions are listed as **Annex A**. A key requirement of this group is that they have deep experience with (either by studying it academically or being a creative practitioner of) public sector management issues such as the differences and similarities between day-to-day-management, campaigns and innovations, and going from special efforts to improved everyday performance.

2. Interview the 5-10 key experts that either designed, implemented, or evaluated the 3-4 most successful projects whose success has been well-documented on the basis of rigorous evaluations (such as those in Table 1 of this report). This is a key step in order to sharpen the questions but more importantly to know what probing questions to use to dig below the initial or surface research questions¹². What the probing questions ought to be is impossible to determine with accuracy until the experts are interviewed. The experts could also suggest names for the focus groups and the key informant interviews discussed below.
3. Create two or three focus groups of no more than 5-10 persons each and meet using Chatham House rules. The purpose of the meetings will be to both sharpen the initial hypotheses or research questions shown in **Annex A**, to perhaps add or remove some, and to also start to provide answers to be held as working hypotheses.
4. Carry out key informant interviews with 20-30 key sectoral officials, academics, civil society leaders, teachers, etc., to qualitatively explore the questions that have been defined in steps 1 and 2, and even the hypotheses as they start to emerge.
5. Draft an authoritative report of no more than 20 pages (may have longer annexes) that details three key issues: 1) how to make ongoing research or experimentation build more on what has existed, 2) what are the barriers that are of greatest importance and that are still uncertain and hence limit adoptions of practices by the everyday doings of the sector, and 3) how to start taking in the most robust findings that have already clearly emerged, into the day-to-day of the sector (or point out that insufficient numbers of actors consider the lessons all that clear, and why).

It seems to be redundant, but perhaps it is not, to note that while the process itself would use Chatham House rules (unless someone prefers to be quoted or have an opinion attributed to them), the list of names of the persons being interviewed would be of public knowledge.

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¹² Probing questions are the sorts of questions one asks once a respondent has said "I would be concerned about X". Such questions normally consist of a probing follow-up such as "But what if X could be done using input A instead of B, or process R instead of S, or if Chief Directorate F could be held accountable to collaborate more with Chief Directorate D"?

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ANNEX A

Here we note some of the key questions or issues that might be holding up a) either (or both) a research and experimentation process that takes on board what has already been done, as opposed to reinventing the wheel or, worse, trying things that have been shown not to work particularly well, or, more importantly, b) might be holding up streaming of non-branded practices into the day-to-day running of the sector. Here we list mostly, only the first-level questions, with a few examples of probing questions. At this stage we cannot do the work that would actually be done by the committee named above in Step 1—that is their task. But the nature of the task may be better understood if we lay out enough of the research questions or issues down to a few probing ones, to give a better feel for what the task of the committee would be.

Costs. There may be concerns that the process uses too many inputs. Probing questions might include whether there are existing resources that could be re-purposed. A deeper probe would be whether those resources would have the capacity or the willingness to be re-purposed (or their superiors would) and if not, what it would take to develop the willingness. In most cases one would be talking about human resources, in some cases about material resources. Above all, what it would take to re-purpose these resources on an ongoing, non-campaign basis, while noting that as reading in the foundational grades is improved, for example, these same resources could be used for mathematics in the foundational grades, reading in later grades, etc. Recall that improving reading in the foundational grades is important not only because it is indeed foundational to all other learning, but, just as importantly, because it can serve as a case in point for improving other subjects in other grades.

Coordination difficulties. The successful cases in South Africa and elsewhere argue for a package of limited “vectors” (to use the terminology developed above) but coordinated in an extremely tight manner. Yet it could be that key informants feel that that degree of tight coordination is simply beyond the capacity of the system. This may not be an unreasonable judgment. In the days of “getting bums on seats” that meant coordinating essentially infrastructure, teacher supply, and materials supply: only 3 pathways of communication. But pathways of communication in an official agency are exponential, not additive. Thus, in improving quality there are at least 6 bureaucratic units that need to coordinate, creating 15 different pathways. This is daunting. However, it seems as if a sufficiently motivated and aware Deputy-Director General (DDG) could make 6 bureaucratic units collaborate at his or her level, in one go (via the right sorts of management techniques) rather than relying on 15 different pathways. So, a probing question might be how to get the right DDGs or HoDs to give the right priority to inducing, or gently forcing, the right degree of coordination between Directorates or Chief Directorates.

“Private” desire for branding? It could be that one subtle reason why efforts stay outside officialdom, as “branded” initiatives, is that non-government implementers benefit from their initiatives being branded, and/or fear that if techniques become un-branded and become routinized into official practice, they may also lose quality control, and would give the technique a bad name, even if un-branded. If this is the case, probing questions would inquire into what sorts of guarantees would be needed for civil society implementers and creative types to let go of some of their ideas, in some sense, and move on to other areas of experimentation where things are not yet ready to be absorbed as non-branded, day-to-day ways of doing things.

Fear of failure. A not-unreasonable hypothesis is that officialdom feels there is more at stake in all this than there is for, say, an NGO, and that trying to replicate the results of an NGO, or even just accept benchmarks and norms as something government will really claim a stake to, exposes them to failure. The World Health Organization (WHO) did not initially accept the target of globally eliminating smallpox for fear of failure, until a set of Latin American countries convinced them that it could be done, because it had indeed been done in Latin America (or similar diseases had indeed been eliminated or nearly so). So, if this appears to be a concern, probing questions here might be around how sure is one that the results are replicable if the “vectors” and processes that have been tried, are used?

Insufficient proof. It may indeed be the case that officials or even leaders in civil society fear there is still simply insufficient proof. Probing questions might be used that would already be a sort of advocacy or would signal towards what advocacy needs to be created, around the proof that exists. Or it could motivate researchers to develop further proof. Though in designing probing questions one would have to understand that when there are other subjacent reasons for non-implementation (such as fear of failure, or inability to coordinate and administrate), insufficient proof is sometimes adduced as a cause. Further probes would be used to discover the sub-areas or specifics where enough proof exists that mainstreaming the practices should really be mandatory if the system truly wants to succeed. That would then outline further research agendas where insufficient proof is truly a problem.

Emotional or ideological issues. It could be that in some quarters there are fears that the most successful practices would seem too dirigiste or too lock-step. Probing questions, that already border on a bit of advocacy or would signal the need for advocacy, would explore the tradeoff between admitting that there is a certain degree of dirigisme here, but for the clear benefit of the children (pending the “sufficient proof” point discussed immediately above). Or they could explore whether the attitude would change once one realizes that the degree of dirigisme might actually be rather minor once better practices are internalized.