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## PERFORMANCE MONITORING REPORT

Annual Progress Report  
July 2012 to September 2013

School Capacity and Innovation Program (SCIP)

Project Title: TARMII<sup>fp</sup>

Teacher Assessment Resources for Monitoring and Improving  
Instruction in the Foundation Phase



Cooperative Agreement Number: AID-674-A-12-00023

Agreement Start and End Dates: July, 01, 2012 to June, 30, 2015

Project Locations: South Africa (Limpopo, Free-State, Mpumalanga, North-West)

Donor 1: USAID

Donor 2: ELMA Foundations

Donor 3: JP Morgan

October-31-2013

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## **1. SECTION A: EXECUTIVE SUMMARY**

The TARMIIfp project has four major objectives: 1) to develop literacy assessment and teaching materials and a software with functions that allow teachers to generate assessment activities, assess learners performance on these activities and develop diagnostics reports; 2) to develop teacher capacity to use the software; 3) to help participating districts develop a program that would sustain the continuous use of the TARMIIfp software beyond the life of the project; 4) to test the hypothesis that teachers' frequent use of the TARMIIfp software would enhance their assessment practices and lead to learners' success in literacy development, and 5) develop a model and action plan for the scale up and sustainability of the project. Most of the activities for the first year of the project were intended to address the first three objectives. One district in each of the four provinces (Bojanala district in North-West, Vhembe district in Limpopo, Thabo Mofutsanyane district in Free State and Nkangala district in Mpumalanga) are involved in this project.

The project started in July, 2012 and, as of September, 2013—the first year of the project, we were able to meet our expected objectives. During this period, we developed over 3,000 Foundation phase literacy assessment items aligned to the curriculum Curriculum Assessment Policy Statement (CAPS). These items have been versioned into the official languages used in schools in the four participating provinces. A fully functional TARMIIfp software has been developed and installed in 80 laptops. Each of the 80 experimental schools (20 schools from each province) involved in the project has been given a laptop preinstalled with the TARMIIfp software. The software allows teachers to i) create a class list, ii) generate assessment activities for learners, iii) assess learners performance on these activities, and iv) generate reports including learners' weaknesses and strength in specific activities and trend analysis. The software also includes a function that provides opportunities for teachers to comment, modify or contribute to the existing assessment activities. Through three major workshops, the project has helped develop teachers' capacity in; 1) formative assessment practices, 2) basic computer usage and 3) the TARMIIfp software functioning. ICT and curriculum development officials in the participating districts have also been given training on the functioning of the TARMIIfp software and led the training for participating teachers in their districts.

Another important activity in the first year was the advocacy meetings in all the four participating provinces that helped us to form steering committees and develop a common understanding that the TARMIIfp project should be an important component of district support system to help teachers develop capacity in the use of technology to improve teaching and learning. Most of the districts have taken our advice to integrate TARMIIfp in their teacher development and support plans and we expect that this development would lead to the TARMIIfp research project developing into TARMIIfp teacher development program within the districts and therefore ensuring the sustainability of the project.

## **2. Section B: Project Implementation**

### **2.1 Project Planning**

The project implementation started with project planning activities which included among others: putting together budgets, Work Plan and Monitoring and Evaluation Plan, and contacts and meetings to discuss project implementation with senior departmental officials in the four identified provinces (Mpumalanga, North West, Limpopo, and Kwa-Zulu Natal) in our proposal.

#### **2.1.1 Advocacy meetings with the Districts**

During the first quarter of the project, meetings were arranged and held in Limpopo, Mpumalanga and North-West provinces to discuss the project, formation of the Steering Committee and the selection of project schools with the senior management in the District Offices. It was agreed that the following departmental officials should constitute the committee: Circuit Managers of the circuits involved, Foundation Phase Curriculum Advisors, E-Learning Coordinator and that meetings should be chaired by the District Senior Manager or delegate.

In **Limpopo** our first meeting with the Senior District Manager and the Acting Senior District Manager took place on the 16<sup>th</sup> of August 2012 to present the project and request them to select two circuits. At the same time we sought permission from the provincial office to carry out the project and received letter of permission on 25 September 2012. A follow-up meeting with the two Vhembe senior district officials took place on the 30<sup>th</sup> of October 2012. Following this meeting, on 4<sup>th</sup> of November we received a list of experimental and control schools from the identified two circuits, namely, Nzhelele East and West circuits as well as a list of members of the Steering Committee. An equal number of experimental and control schools were selected from each circuit.

In the **North-West** the HSRC team had its first meeting with the Executive District Manager of Bojanala district and other officials in the district on 17 September 2012. The team presented the proposed research project to Bojanala District Officials. During this meeting, the District team committed to supporting and partnering with the HSRC during the life of the project. They also undertook to put together proposed names of the steering committee as well as to identify project schools. Subsequent to this meeting, the district identified a contact person for the project who was the District Director for Professional Support. Two districts (Letlhabile and Madibeng) were identified for project.

In **Mpumalanga**, the first meeting with the Nkangala District Director and other district officials took place on the 10<sup>th</sup> of September 2012 where the proposed TARMII-fp was presented. The discussions at this meeting included, the selection of project schools and the composition of the steering committee. This was followed by two meetings, on the 2<sup>nd</sup> of October and the 23<sup>rd</sup> of November 2012 to report back to the HSRC on the selected circuits and schools and the

constitution of the steering committee. The HSRC worked with the district in selecting the control and experimental schools from the following four circuits: Libangeni (10 experimental schools), Siyabuswa (10 control schools), Weltevrede (10 experimental schools) and Tweefontein North (10 control schools) in the Nkangala district.

In **KwaZulu Natal** the HSRC team made first contact with the Director of Foundation phase on the 25<sup>th</sup> of July to introduce the project and to request permission to carry out the study. Follow-up contacts were made with the provincial office but no response was forthcoming from the provincial office.

Since further delays would affect project implementation in that province, the HSRC team decided to abandon Kwa-Zulu Natal and explored negotiations with two provinces, Gauteng and the Free State provinces. With regard to the Gauteng province, the HSRC began negotiations with Tshwane South District because it had participated in the initial TARMII study. The meeting with officials from this district took place at the HSRC offices on the 25<sup>th</sup> of October 2012. During discussions, it was brought to our attention that the majority of possible schools to be selected for participation in this project would come from the Gauteng Primary Language and Mathematics Strategy (GPLMS) schools. District Officials indicated that it would pose a problem working in these schools due to the GPLMS intervention programme initiated by the MEC. We decided not to include Gauteng province in the project and to further explore the Free-State province.

The HSRC had a meeting with the Free-State Provincial Department of Education in Bloemfontein on the 18<sup>th</sup> of January 2013, to seek provincial permission to implement TARMII<sub>fp</sub> in the Thabo Mofutsanyane District. The Superintendent General (SG) and his three Deputy Director Generals represented the provincial education department. Following this meeting, the HSRC received correspondence from the Deputy Director General's office in March acceding to the HSRC request to commence with project activities in the district.

The first advocacy meeting with the Thabo Mofutsanyane District took place on the 9<sup>th</sup> of April in the Thabo Mofutsanyane district. The District Office indicated that the goal of the TARMII<sub>fp</sub> resonated with their aim as discussions are underway on how teaching and learning can be improved through the use the Annual National Assessment results. The Foundation Phase officials contended that they would like to peruse training materials before they are presented to the teachers to determine compliance to the new curriculum. It was decided that TARMII<sub>fp</sub> project activities would form part of the district plan.

### 2.1.2 Steering Committee meetings

Steering committees comprising senior district official, circuit managers, and curriculum and ICT experts have formed in all the four provinces. The table below indicates the meetings that occurred in the four provinces during the first Year.

**Table 1: Steering Committee Meetings**

Province	Meeting Date	Purpose	Action
Limpopo	10 December	Present TARMIfp project and discuss project activities for Year 1	HSRC to engage with Nzhelele East and West Circuit Managers for implementing project activities in the district
North-West	16 January 2013	To discuss the selection of project schools, plan for principal advocacy meetings	Principal advocacy meeting to be held on 30 January  Training of teachers in the three modules, namely, Assessment, Basic ICT & TARMIfp software to take place in April/May;  The district office to put together a list of guests representing North West education for the laptop handover ceremony.
	7 March 2013	Planning for assessment and basic ICT training	Dates for teacher Assessment training: 15, 16 & 17 April.  Dates for Basic ICT training: week of the 22 to 26 April
	19 June 2013	Discuss feedback on the action assessment and basic ICT training and training dates for TARMIfp software training	Laptop handover to take place on 15 August and Tariff software training on 19, 20 & 21 August
Mpumalanga	21 June 2013	Discuss how TARMIfp should be integrated into operational plans and processes of the district	District to provide HSRC with a plan which integrates TARMIfp project
Free State	9 April 2013	Present TARMIfp and discuss how activities in the province can be fast tracked.	It was decided that TARMIfp project activities would form part of the district plan.

### 2.1.3 Advocacy meetings with school principals and teachers

Working with the steering committee, the HSRC team held advocacy meetings with principals and teachers for the purpose of ensuring that principals and teachers involved in the project develop a clear understanding of the project objectives and how we intend to achieve these objectives with their cooperation and active participation. The advocacy meetings for principals occurred in the

four provinces during the third and fourth quarter of Year 1. The purpose of these meetings was to present TARMIfp to principals of 20 experimental and 20 control schools as well as to explain the baseline data collection and handout baseline questionnaires (school, teacher and home and learner questionnaires) to schools. In Limpopo and North-West the meetings took place in January; in Mpumalanga the meeting was held in March and in the Free State this occurred in April.

The teacher advocacy sessions for both the control and experimental groups took place during the third and fourth quarter of Year 1. The meeting in the North-West occurred on the 20<sup>th</sup> and 21<sup>st</sup> February. During these sessions, experimental teachers were informed about the project and completed the ICT baseline questionnaire, consent forms and the teacher questionnaire. The control group completed the consent form and teacher questionnaire.

In Mpumalanga, the teacher advocacy meetings planned to take place from 15 to 18 April 2013 were suspended and deferred to a later date due to the South African Democratic Teachers Union's (SADTU) protest action. Subsequent to the end of the protest action, four teacher-advocacy meetings were held on 27, 28, 29 and 30 May in the four participating circuits, namely, Libangeni, Weltevrede, Tweefonten and Siyabuswa. During the meetings teachers were introduced to the TARMIfp project and instruments for baseline data collection were also administered.

## **2.2 The development of literacy assessment items**

This process entailed identifying potential item writers/developers and contracting them to map existing assessment items onto the new curriculum and to develop a thousand English literacy assessment items per grade (i.e. grade 1, 2 & 3). On the 17<sup>th</sup> of July 2012 the HSRC research team had a meeting with a group of potential writers or developers of literacy assessment activities for various official languages. The invited people included independent material developers, a university lecture (a teachers educator), Foundation Phase teachers from schools around Pretoria.

Subsequently, the HSRC research team contracted two Foundation Phase teachers and a retired Foundation Phase senior district education specialist (SES), to map existing assessment items to the CAPS and to develop new CAPS aligned items.

### **2.2.1 Mapping of ARB test items and the Development of 1000 assessment items in English**

The process of mapping existing items and developing new English assessment activities occurred simultaneously. This process took longer than anticipated, however, by the end of the fourth quarter, 1000 grade 1, 1030 grade 2 and 1668 grade 3 English literacy assessment items were

developed which covered the four Language Component: Listening and Speaking, Reading, Phonics, Writing and Handwriting) specified in the new curriculum known as the CAPS.

### **2.2.2 Versioning of the assessment items into other 10 official languages**

Foundation phase teachers, university lecturers and subject advisors were contracted to version the grades 1, 2 & 3 English Home Language assessment activities into the remaining 10 official languages.

The process of versioning the assessment activities into the other ten official languages of South Africa namely, Afrikaans, isiNdebele, isiZulu, isiXhosa, Sepedi, Sesotho, Setswana, Siswati, Tshivenda and Xitsonga) commenced in the third quarter and continues through the second year of the project. This process took longer than anticipated and is expected to be completed in December 2013.

### **2.2.3 Quality Assurance of assessment items**

This process commenced in July 2013. Fifteen teachers and curriculum advisors from Limpopo, North West and the Free State provinces were brought together in Pretoria to quality assure versioned assessment activities in Setswana, IsiZulu, Sesotho and Tshivenda. Quality assurance of assessment activities will continue as teachers use the activities in the TARMIIfp software.

## **2.3 Software development and installation of software onto computers**

The HSRC team met to conceptualise the “look and function” of the new TARMII. This was followed by a number of teleconferences with the software developer, Roche Compaan to discuss the development stages of the software. A face-to-face meeting was held with Roche on the 2<sup>nd</sup> of August 2012. At this meeting, it was agreed that the interface would include the old tested functions and modules as well as new innovative functions. The following key issues were discussed and agreed upon:

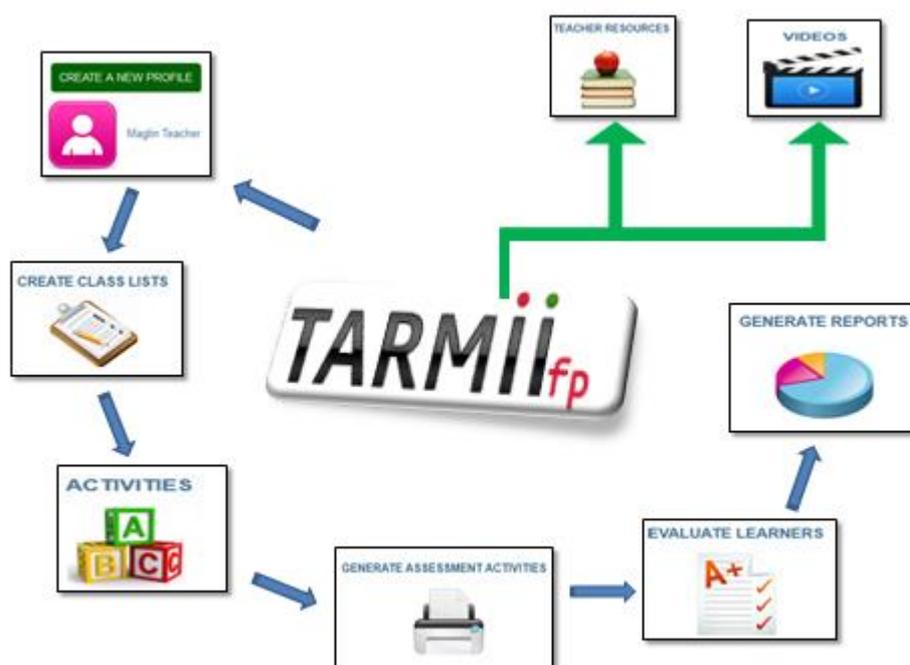
- the system would have a remote data collection function wherein data would be automatically received by the HSRC when teachers log onto the TARMIIfp system and a multi-language interface
- type of media clips to be included in the software.
- the graphic design appearance of the interface and responsibility to design it.
- the hosting responsibility

It was also decided that a separate interface of TARMIIfp be designed rather than duplicating the existing TARMII. The rationale for this was that a common landing page could then be developed that would allow navigation between the two programs.

The major components of the system have been completed. The components developed include:

- (a) User interface design
- (b) Multi language interface
- (c) Registration page
- (d) Teacher interface for teacher resources
- (e) Admin interface for topic tree
- (f) Teacher interface to contribute assessment tasks
- (g) Admin interface to upload flash videos
- (h) Teacher interface for feedback on assessment items
- (i) Teacher interface to view flash videos

## The TARMIIfp software



All software modules were completed in the first year of the project. The software includes among others a data collection facility that allows the HSRC to monitor teacher usage and therefore identify teachers that need support. In addition to this, the software has functions that allow trained teachers to generate assessment activities for their learners, assess and generate reports on the performance learner performance, create their own assessment activities and communicate their views on the existing activities within the software.

### *Development of TARMIIfp pedagogic clips*

In August 2012, the HSRC contracted a graphic designer to design and develop pedagogic clips that would guide teachers in teaching identified areas in the Foundation Phase. A total of 33 pedagogic clips and 176 static teacher resources were developed. These clips contain short clips that guide, inform and support teachers on specific and general strategies in the Foundation Phase. They cover areas of sentence construction, writing and speaking skills. These resources can be used by teachers to enhance their teaching or to support their lesson. Resources include stories, poems, alphabet charts and pictures (*see attached samples of resources*). These clips have been uploaded onto the software.

### **2.3.1 Purchasing of 85 laptops and 3G dongles**

The 85 laptops and 3G dongles were purchased and delivered to the HSRC on the 25<sup>th</sup> of October. The laptops have been registered under the HSRC asset register and are covered under the HSRC global insurance. The HSRC signed a contract in March 2013 with Nambiti Technologies for a Top Up data 1Gig for the 80 3G dongles. However, due to Nambiti technologies not meeting their contractual obligation, the HSRC cancelled the contract and signed a new contract with a company called CorpConnect.

### **2.3.2 Installation of software onto laptops**

During February and March 2013, the HSRC contracted temporary workers to install and verify all software onto the 80 laptops. This included office and anti-virus packages.

### **2.3.3 Uploading of assessment items onto the TARMIIfp software**

During April 2013, the HSRC engaged six contract workers from Amaqhawe Consulting to start the process of uploading existing English, Tshivenda, IsiXhosa, Sepedi, Setswana and Sesotho assessment activities items onto the system. The process of uploading items would continue in the first quarter of the second year as versioning continues.

### **2.3.4 Field testing of TARMIIfp software**

The functionality of the TARMIIfp software was tested at a workshop for District Officials held at the HSRC in Pretoria on the 11<sup>th</sup> April 2013 where a total of 21 District officials from Free State, Limpopo and Mpumalanga, North-West used the system and gave feedback on the functionality and content of the system.

## **2.4 Training and support for teachers**

During the first year of the project, the project organised a number of workshops to help teachers develop capacity in; 1) formative assessment practices, 2) basic computer skills (ICT) and 3) using the TARMIIfp software functions. Rubricating Works and McMillan Teacher Campus facilitated the assessment training. District Officials participated in the assessment workshops. In preparation for training and support for teachers to develop understanding of the functioning of TARMIIfp, the HSRC trained the District Officials in the basic ICT and the TARMIIfp software. We refer to this as master training sessions that are intended to build capacity in the districts to support teachers.

#### **2.4.1 Master training sessions**

The training of District Officials as Master trainers occurred in the fourth and fifth quarter of Year 1. District Officials were trained in the basic ICT and TARMIIfp software so that they would be able to train and support teachers in their respective provinces.

The first training of District Officials took place at the HSRC in Pretoria on the 11<sup>th</sup> of April 2013. This was attended by a total of 21 District Officials from all four provinces including representatives from USAID and ELMA Foundation. The purpose of this training session was to introduce the TARMIIfp software to the District Officials. At this session, the HSRC shared the findings of the teacher ICT basic skills, highlighting that the data showed that most teachers lack basic computer skills and only a handful could be regarded or categorized as having ‘advanced skills’. This was followed by introducing the participants to the TARMIIfp software.

The second training took place on the 8<sup>th</sup> August 2013 at the HSRC offices in Pretoria. The aim of this session was to develop capacity among district officials to train teachers in their respective provinces. District Officials from North West, Mpumalanga and Limpopo attended this session. The officials were introduced to the final TARMIIfp software and the training was done in conjunction with the draft user manual as well as the training guide. In total 11 officials attended this training and at the end of the session they were each supplied with a CD of the software. The Free State team did not attend the training due to work schedules.

A further train the trainer TARMIIfp workshop facilitated by the HSRC was held in Mpumalanga for Foundation Phase District Officials who could not participate in the August training held at the HSRC in Pretoria. Five Foundation Phase officials attended this three-hour TARMIIfp training workshop in Nkangala’s Sizani Primary School on 17<sup>th</sup> September 2013.

The HSRC team facilitated training of District Officials in the Free State. This was conducted on the 16<sup>th</sup> August 2013. This session was attended by the Foundation Phase and E-Learning team. All officials installed the software onto their laptops and two were identified as the master trainers for the Free State.

Table 2 below gives a summary of the number of District Officials trained per province.

**Table 2: Number of District Officials trained**

Province	Assessment training	Basic ICT training	TARMIIfp software training
Limpopo	5	4	7
North-West	7	4	5
Free State	7	11	7
Mpumalanga	5	5	5

#### **2.4.2 Assessment Training of teachers**

In each province, 60 foundation teachers (i.e. three teachers per school) from the experimental schools were selected to participate in three training sessions, namely assessment, basic ICT and TARMIIIfp software. However, in the case of the Free State province, 10 of the 20 experimental schools have multi-grade classrooms where a single teacher teaches grades 1, 2 and 3 in a single classroom. Therefore, instead of having 60 teachers from this province, a total of 50 teachers participate in the project.

The assessment training of teachers in **Limpopo** from Nzhelele West and East circuits took place on 11- 12 and 13-14 March 2013. Training was facilitated by Tracey Butchart from Rubricating Works. Teachers from each circuit received six hours of training over two afternoons after school. The training of teachers in the Free-State took place on the 13<sup>th</sup> & 14<sup>th</sup> of May 2013; North-West from 14-16 May 2013 and Mpumalanga from 22-24 July 2013. This training was aimed at closing the gaps in teachers understanding and practice of assessment methods and procedures stipulated in the CAPS document. Training sessions in the three provinces were conducted during school hours and were facilitated by McMillan Teacher campus. Each teacher received a certificate of attendance on completion of the training session.

##### **2.4.2.1 Basic ICT training**

In preparation for the basic ICT training, teachers from all four provinces responded to a baseline instrument to determine their level of computer literacy. In **Limpopo**, 59 of the 60 teachers responded to the questionnaire and in the North-West, all 60 teachers completed the questionnaire.

The results showed that 93% of teachers in Limpopo and 69% of North-West teachers did not have the general windows skills and other technical skills. Ninety percent of teachers in Limpopo and 74% of North-West teachers have never used excel. Regarding the use of internet, 95% of teachers from Limpopo and 78% of North-West teachers had no internet knowledge.

In the **Free State**, out of the 24 teachers who completed this questionnaire, 32% did not have the general windows skills and other technical skills; 66% indicated that they have general windows skills and other technical skills; 38% never used excel and 62% used excel before and 83% never used the internet while 17% use internet.

In **Mpumalanga**, out of the 29 teachers who completed the questionnaire, 88% did not have the general windows skills and other technical skills and 12% indicated that they have general windows skills and other technical skills; 89% never used excel while 11% have used excel before and 95% have never used the internet.

These results were shared with the District Officials and also informed the instructional strategies designed for the ICT workshops.

The training of teachers from Limpopo and North-West provinces on the basic ICT skills occurred during the fourth quarter reporting period. Training in the North-West happened from the 23<sup>rd</sup> to the 25<sup>th</sup> of April 2013, while Limpopo teachers had their training from 6-9 May 2013. The Free State and Mpumalanga had their training in the fifth quarter. Full-day training workshops on the basic ICT skill and the TARMIfp system were held on the 18<sup>th</sup>, 19<sup>th</sup> and 20<sup>th</sup> September 2013. In the Free State four day basic ICT training sessions were held from 1-4 July 2013. Training workshops in all four provinces were facilitated by e-Learning District Officials and monitored by the HSRC team. The HSRC developed a training manual which was handed to teachers as a resource.

#### **2.4.2.3 TARMIfp software training**

This training took place in all four provinces during the fifth quarter. TARMIfp training in Limpopo occurred on 13&4 and 15&16 August, in Mpumalanga on 18, 19 &20 September, in the North-West on 19, 20, 21 & 26, 27, 28 August and in the Free State on 20 August. In each province, training sessions were facilitated by e-Learning District Officials and monitored by the HSRC team. Teachers were given one TARMIfp software training manual per school. It should be noted that in **Mpumalanga** the basic ICT training and TARMIfp software training occurred simultaneously. The two training sessions were combined because in the other provinces where basic ICT was done without providing teachers with laptops, when they came for TARMIfp training they could not remember the basic skills they had learnt before.

**Table 3: Number of Teachers Trained**

Province	Assessment training	Basic ICT training	TARMIIfp software training
Free State (Thabo Mofutsanyane District)	60	24	48
Limpopo (Vhembe District)	62	54	56
Mpumalanga (Nkangala District)	60	59	
North-West (Bojanala District)	67	44	60

## 2.5 Laptop handover ceremonies

The laptops purchased for this project were handed to the school principals at ceremonies held in the four provinces during August and September 2013.

The **North West** ceremony took place on the 15th August 2013. This was attended by school principals from 16 schools, a teacher, and officials from the two circuits, HSRC team and a representative from the USAID. The laptops of four who were unable to attend the ceremony were handed over to the District co-ordinators to hand over to the schools. The handing over ceremony in the **Free State** took place on the 16<sup>th</sup> August 2013. The schools were represented by the principal and a member from the school governing body.

**In Limpopo**, this occurred on the 13<sup>th</sup> of August and was attended by 24 departmental officials representing school principals, HoDs, Foundation Phase Curriculum Coordinator and the two circuit managers as well as the HSRC.

**In Mpumalanga**, this ceremony was held on the 17<sup>th</sup> September 2013 and was attended by ±120 people. This included representatives from school principals, Head of Departments, School Governing Body members and QLTC member as well as representatives from the district and the circuits and the HSRC team.

After each ceremony, school principals remained behind to complete and sign the TARMIIfp Legal Agreement pertaining to the laptops. This Agreement has been vetted by the HSRC Legal Department.

### **3. Section C: Performance Monitoring and Evaluation.**

The project has achieved its four main milestones and expected deliverables for the first year:

- a) The development of the software—the TARMIIfp,
- b) The development of over a thousand English literacy assessment test items per grade
- c) The input of the test items into the computer software,
- d) Training of teachers on assessment, basic ICT skills and the TARMIIfp software

### **4. Section D: Sustainability**

One of the major accomplishments of the TARMIIfp project, thus far, is the enthusiasm that we have managed to develop among district officials involved in the project. In our advocacy meetings, we have always emphasized the need for both the HSRC team and the participating districts to have clear understanding of the TARMIIfp project—a development of a software and assessment activities for the purpose of improving teaching and learning. We recognise that, for the TARMIIfp project to succeed we would need the support and cooperation of all research participants, especially, the district officials and teachers involved in the project. In the North-West, Limpopo and the Free State, it is evident that the districts have taken ownership of the project. These districts see TARMIIfp project as an important component of their support system for teachers to use technology to improve teaching and learning.

The E-learning section of the Bojanala district in the North-West developed the basic ICT questionnaire to determine the computer literacy skills of teachers in the district. This tool was shared with the HSRC and it was adapted for use in the other three provinces. Furthermore, the basic ICT and TARMIIfp software teacher training sessions were facilitated by the District Officials. Teachers and curriculum advisors from these three districts have been involved in the versioning of assessment activities into the languages spoken in the provinces and the quality assurance thereof. The District Officials have undertaken to continue monitor implementation of the TARMIIfp in the participating schools. The Thabo Mofutsanyane district in the Free State has integrated the monitoring of TARMIIfp into their school visit programme for the fourth term.

We expect that these developments would lead to the sustainability of the TARMIIfp project in these districts. We intend to document our research engagements with districts for the purpose of developing a model and understanding of how technology for education improvement in South Africa should evolve.

## 5. Section E: Challenges, constraints and lessons learnt

The development of assessment items/activities was a major challenge. These challenges resulted in delays in the delivery of the assessment activities within the time-frames set in the Annual Work Plan. We had indicated in the funding proposal that we would contract teachers and curriculum experts to develop assessment items for the TARMIIfp system as this would help them develop a sense of ownership and contribute to the sustained use of TARMIIfp software. We therefore, contracted teachers and curriculum advisors to develop CAPS aligned literacy assessment activities for teachers in the Foundation Phase. It was evident from the work submitted to the HSRC by the assessment item writers contracted to develop assessment items/ activities, that teachers interpreted the new curriculum, Curriculum Assessment and Policy Statement (CAPS) differently. To counter this, the HSRC team sought to interact and consult with more teachers, district officials and other education allied professionals outside the school systems to get a good understanding of what is expected of teachers to implement the CAPS successfully in the classroom. This process was helpful in giving insights into CAPS implementation and this information was shared with assessment item writers.

### *Developing assessment activities*

The ability to develop good assessment activities is a highly specialised skill which few individual teachers in South African possess. Although the contracted teachers had previous experience with item development, they were not adequately skilled to carry out the task. In order to ensure that the TARMIIfp items were of good quality, the HSRC research team had to employ an internal quality assurance mechanism, wherein, each of the three teachers who maps and writes assessment items would have their work first checked by the HSRC researcher(s) and commented on. The corrected version would then be checked and moderated by the other two writers.

### *Project Activities in the Free State and Mpumalanga Provinces*

It was anticipated that delays in obtaining permission to commence with project activities in the **Free State** would have a negative impact on the progress of the project. However, the Thabo Mofutsanyane District Director and her team were able to fast track activities in such a way that in less than two weeks after securing a meeting with the district, schools were selected and the list forwarded to the HSRC.

In the **Mpumalanga** province, the teacher union go-slow affected the teacher and principal baseline data collection. The HSRC engaged with the provincial Steering Committee to work out alternative arrangements for data collection.

The HSRC believes that in order to ensure sustainability of the project, there has to be synergy between TARMIfp activities and district/circuits/schools operational plans. However, this is not the case in Mpumalanga province as the Nkangala district has not fully integrated TARMIfp into district operational plans. The HSRC continues to address this matter through the District Director's office.

On the 30<sup>th</sup> September 2013, the HSRC received a report that one of the laptops from the TARMIfp study was stolen from Dirang Primary School in the North West. A burglary occurred at the school, and thieves had broken the wall and gained entry into the school's safe room. A number of electronic devices including the laptop were stolen. We were supplied with the police case number. We plan to have a meeting with HSRC legal services as well as the province project steering committee to address this issue.

## 6 Section F: Budget Summary

<b>DONOR 1: USAID (reporting currency ZAR)</b>										
	<b>A</b>	<b>B*</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F=D+E</b>	<b>G=C-F</b>	<b>H</b>	<b>I=A-H</b>	
Cost Category	Approved project budget	Approved year 1 budget (current year)	Total year 1 funds received	Total year 1 expenses previously reported	Expenses in current quarter	Year 1 expenditure to end of current quarter	Unobligated funds on hand	Total project expenditure to date +	Total project funds remaining#	
Salaries	2,232,510.00	419,006.00	383,835.97	490,903.72	156,716.27	647,619.99	-263,784.01	647,619.99	1,584,890.02	N
Travel costs	351,631.00	86,002.00	78,783.27	76,477.78	25,221.35	101,699.13	-22,915.86	101,699.13	249,931.87	N
Other Direct costs	468,496.00	296,702.00	271,797.78	239,833.49	5,390.21	245,223.70	26,574.08	245,223.70	223,272.31	N
Program costs	1,516,963.00	1,077,174.00	986,759.45	486,934.32	219,447.50	706,381.82	280,377.63	706,381.82	810,581.19	N
Internal Capacity Development	115,850.00	35,000.00	32,062.21	2,826.56	-	2,826.56	29,235.65	2,826.56	113,023.44	N
Overheads	632,534.00	258,377.00	236,689.66	175,091.75	54,941.79	230,033.54	6,656.12	230,033.54	402,500.47	N
<b>TOTALS</b>	<b>5,317,984.00</b>	<b>2,172,261.00</b>	<b>1,989,928.33</b>	<b>1,472,067.62</b>	<b>461,717.10</b>	<b>1,933,784.72</b>	<b>56,143.61</b>	<b>1,933,784.72</b>	<b>3,384,199.28</b>	N

<b>DONOR 2: The ELMA Foundation (reporting currency ZAR)</b>									
	<b>A</b>	<b>B*</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F=D+E</b>	<b>G=C-F</b>	<b>H</b>	<b>I=A-H</b>
Cost Category	Approved project budget	Approved year 1 budget (current year)	Total year 1 funds received	Total year 1 expenses previously reported	Expenses in current quarter	Year 1 expenditure to end of current quarter	Unobligated funds on hand	Total project expenditure to date +	Total project funds remaining#
Salaries	2,232,510.00	419,006.00	1,067,061.97	490,903.72	156,716.27	647,619.99	419,441.98	647,619.99	1,584,890.02
Travel costs	351,631.00	86,002.00	168,067.36	76,477.78	25,221.35	101,699.13	66,368.23	101,699.13	249,931.87
Other Direct costs	468,496.00	296,702.00	223,924.76	239,833.49	5,390.21	245,223.70	1,298.94	245,223.70	223,272.31
Program costs	1,516,963.00	1,077,174.00	725,055.44	486,934.32	219,447.50	706,381.82	18,673.63	706,381.82	810,581.19
Internal Capacity Development	115,850.00	35,000.00	55,372.26	2,826.56	-	2,826.56	52,545.70	2,826.56	113,023.44
Overheads	632,534.00	258,377.00	302,329.21	175,091.75	54,941.79	230,033.54	72,295.67	230,033.54	402,500.47
<b>TOTALS</b>	<b>5,317,984.00</b>	<b>2,172,261.00</b>	<b>2,541,811.00</b>	<b>,472,067.62</b>	<b>461,717.10</b>	<b>1,933,784.72</b>	<b>608,026.28</b>	<b>1,933,784.72</b>	<b>3,384,199.28</b>

\* - The year will change as per the project year.

+ - This reports all years from project inception to-date. Ledger source.

# - Not necessarily received.

**Notes related to figures stated in column H - Total project expenditure to date:**

N1 Salaries in line with 5 quarters and based on the revised year 2 work plan and budget submitted as from 1 July 2013 onwards.

N2 Travel costs in line with 5 quarters and based on the revised year 2 work plan and budget submitted as from 1 July 2013 onwards.

- N3 Other direct costs below budget as computers were procured at a special price and 3G costs to increase after distribution of computers.
- N4 Programme costs below budget as versioning and quality assurance of items still in progress and data collection not yet underway.
- N5 Internal capacity below budget due to limited planned activities and funds reallocated as per revised year 2 work plan and budget.
- N6 Overheads strictly 13.5% on actual expenditure and therefore in line with spending on other line items.

