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J.P.Morgan

**TARMIIfp Progress Quarterly Report**  
FY 2014 (Jan - March 2014)

School Capacity and Innovation Program (SCIP)

**Project Title: TARMII***fp*

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

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## Acronym List

ARB	Assessment Resource Bank
AS	Assessment Standard
CAPS	Curriculum Assessment and Policy Statement
DBE	Department of Basic Education
FLP	Foundations of Learning Programme
FS	Free State
HODs	Head of Department
HSRC	Human Science Research Council
ICT	Information Communication Technology
LP	Limpopo
MEC	Member of the Executive Council
MP	Mpumalanga
NCS	National Curriculum Statement
NW	North West
SADTU	South African Democratic Teachers Union's
SES	Foundation Phase senior district education specialist
SGBM	School Governing Body members
TARMIIfp	Teacher Assessment Resources for Monitoring and Improving Instruction in the Foundation Phase

## **Executive Summary**

This report provides details of the TARMII*fp* project activities for the period January, to March, 2014. As indicated in the previous report, the major activity for this period was the data collection from participating schools about their learners' current literacy development. Given that the South African school academic year starts from January and ends in December, we intend to use the 2014 academic year to test the hypothesis that teachers' frequent use of the TARMII*fp* software would have a positive impact on their learners' home language literacy development. The data collection for this period was therefore intended to serve as baseline information to test our hypothesis. The data collection was scheduled in early February, 2014 but had to be postponed to late February and March, 2014 because of industrial strike action of courier services in South Africa that made it impossible to transport the test materials to the provinces. We were able to collect data from three provinces— Limpopo, North West and Mpumalanga. And as usual, the district officials from these provinces provided support identifying retired teachers and principals who helped in administering the test to learners in the control and experimental schools. The data collection in March, 2014 however posed a number of challenges including the heavy rainfalls that made it impossible to collect data from eight schools in Mpumalanga. In Free State, the district office could not accommodate our rescheduled dates because of the district's busy planned school activities in March, 2014. We are working with the district (Free State) to reschedule the data collection preferably, in April, 2014. The major activities for the next quarter (April to June, 2014) would include, the installation of the second version of the of TARMII*fp* software. This version will include the webhosting facility to enable the 3G function for remote data collection on teachers' use of the software. We would follow the installation with workshops providing support to teachers.

## **Background**

We have already alluded to the fact that the 2014 school academic year (January, to December, 2014) would be an important period for the project. With participating teachers trained on; formative assessment practices, basic competence on computer and the use of the

TARMIIfp software, our hope is that teachers' frequent use of the software would lead to an improvement in their learners' literacy development. It should however, be noted that 2014 is an election year with the general election to select the next South Africa president and parliamentarians scheduled in May, 2014. At this moment, it is very difficult to predict how the political atmosphere resulting from campaigning for votes and the election results would affect the project implementation. We also wish to note that following the learning forum workshop held at the Department of Basic Education organised by SCIP for implementing partners, we have been invited to present the TARMIIfp project to the office of the Director General of the South African Basic Education. We expect that this presentation and discussion would pave the way for sustainability and the scaling up the project by the Department of Basic Education.

## **Activities**

The main activities planned for this quarter were: the designing the test instruments; the administration of the test instruments and data collection; marking and data capturing; and data analysis. Other activities included updates of the software and versioning of assessment activities.

### *3.1 Designing the test*

The test used for collecting baseline language and literacy scores in all project schools consisted of two parts, namely the oral language (OL) component and the written language (WL) component. In each grade, the OL tested the learners' basic oral proficiency whereas WL tested their written language proficiency. The OL tested the learners' basic oral language proficiency in each grade. It consisted of a letter-sound subtest and word reading subtest. The letter-sound subtest required learners to say the sounds of the various letters of the alphabet in their language of learning and teaching. The word reading test required learners to correctly read aloud the grade appropriate familiar words presented to them. These are the words taken from of the grade appropriate curriculum materials (learners' school workbooks) and check for appropriateness through a pilot and by the Foundation Phase curriculum specialists for the various languages. The Written Language section consisted of test items selected from the released ANA items. These items tested learners' reading comprehension and their ability to use various grammatical structures of their language. Learners in both experimental and control schools were tested on both test components.

The learner baseline testing involved the following key activities:

- (1) Communication with the districts to define their involvement in the test administration
- (2) Training of test administrators
- (3) The administration of the test to a sample of 20 learners in grades 1, 2 and 3 of teachers in the control and experimental schools

### *3.2 The administration of test instruments and data collection.*

The administration of the test instruments and data collection involved three main processes; communication with the district to define their involvement, the training of test administrators and data collection. The involvement of the districts included; identifying 20 retired teachers to serve as test administrators, communicating about the testing to all participating schools (20 experimental and 20 control schools), providing HSRC with 2014 class list of teachers participating in the project and identifying district officials to monitor the test administration processes in schools.

In the North West with assistance and guidance from the Bojanala District office we secured the names of 20 retired Foundation Phase teachers who would serve as test administrators as they had the knowledge of the schools and were fluent in Setswana. The teachers comprised of 19 females and 1 male retired teacher. To ensure the smooth running of the baseline testing, all fieldworkers attended a day training session. The first meeting took place at the Madibeng District office on the 10th February 2014 at which time all interested retired teachers attended. This was then followed by a full day training session on the 17th February 2014; training took place at two venues, Madibeng District office for the Madibeng group of test administrators and at Lorato Primary school from the Lethlabehle group of test administrators. During the training sessions, a total of 10 retired teachers attended the Madibeng circuit training and 11 retirees attended the Lethlabehle training. Due to the geographical location of these schools, a great deal of the time was spent grouping schools and the teams to ensure schools were selected for teams based on geographical ease. The training focused on the following aspects:

- (1) Purpose of the research
- (2) Background to the schools taking part.
- (3) Geographical location of schools.

- (4) Working with the actual tests (oral and written)
- (5) Process on sampling learners
- (6) Understanding the various administration forms
- (7) Working with the core record sheets.
- (8) Completion and finalising all contract and bank forms.

During the training sessions, circuit officials from Madibeng were present and were instrumental in the setting up of the groups and travel plans. However the same did not occur in Lethlabhile. In this circuit, the HSRC team had to take full control. All necessary arrangements were made to ensure that each team had a team leader that would serve as the point person.

In Limpopo, two circuits (Nzhele East and Nzhele West) within the district are involved in the project. Through the assistance of the managers of the two circuits, we managed to secure the services of 20 retired teachers and principals. On 13<sup>th</sup> February, 2014 we had training workshop for these teachers. The training followed a similar pattern as was done in North West.

In Mpumankanga, 20 potential fieldworkers were identified and selected for baseline testing with the help of Nkangala district office. These fieldworkers had to meet the following selection criterion:

- (1) They should have passed grade 12 or matric;
- (2) Be fluent speakers and writers of either isiNdebele or Sepedi or both languages;
- (3) Able to work with children in Foundation Phase (Grades 1, 2 & 3); and
- (4) And reside in any area around the following 4 circuits (of Libangeni, Weltevrede, Siyabuswa and Tweefontein North), where the project schools are located.

Only 19 of the 20 individuals (consisting 16 females and 3 males) were finally contracted to assist with the administration of the isiNdebele and Sepedi literacy testing during March 2014. Testing occurred during 01 to 08 March 2014. Training of fieldworkers occurred on Sunday afternoon of 01 March 2014 at Phakgamang Primary School in Siyabuswa. It entailed taking the fieldworkers through the entire data collection process (e.g. the process of administering the oral and written test items in isiNdebele and Sepedi), associated administration issues (e.g. completion of contract forms) and logistics (e.g. grouping schools for testing purposes and assigning them to fieldworker teams).

### *3.3 Administration of the baseline tests.*

In the North West the baseline testing during the week of the 3rd March 2014 to 7th March 2014. During this week a total of 40 schools, comprising of 20 experimental and 20 control schools took part were involved in the testing.

All schools (40) received a memo via the District office informing them about the date and time the test teams would visit the school. As part of the testing plan, every school would have 20 learners sampled from each of the identified grade (Grade 1, 2 & 3) that would take part in the testing. So in a school 60 learners were tested (20 from each of the 3 grades). Each learner taking part in the testing would have to first complete a written assessment and then move forward to complete a reading/ oral assessment. Each team had a timetable for the week based on the times and the schools they had to be tested. Teams would then complete testing in one school and then move to the second school for the day.

As part of their contract, the test administrators were expected to complete all admin work, which entailed marking of written assessments and recording all scores onto the specially prepared sheets. These sheets would then be collected by the HSRC team as they visited the testing schools to conduct monitoring and quality assurance.

The first day proved to be a trial period for all groups, as this was the first time, many teams had to adjust their approach to testing and the time they used. This resulted in the remainder days running fairly smoothly as administrators had gauged how to manage their time. The greatest challenge we faced during this period was the extreme rains South Africa, especially North West province experienced. From the 40 schools that were to be tested, two schools could not be tested, one because no learners arrived for schooling on the day due to roads being washed away. The second school that could not be tested was an issue of language. This was an Afrikaans medium school and as a result the principal requested that the test administrators conducting the testing should be at least Afrikaans first language speakers. Both these schools had to be rescheduled. Overall, in the North West 95% of the schools were tested. During the testing process at each school, the following instruments were collected: learner oral assessment, learner written assessment, teacher questionnaire, and class list per participating school. All instruments were collected and handed over to the HSRC research team by the end of the week.

In Mpumalanga's Nkangala district, baseline testing took place on the 03 to 07 March 2014. This baseline testing involved administering literacy / language tests in isiNdebele and Sepedi to learners in Grades 1, 2 and 3 in 40 project schools (comprising 20 experimental and 20 control schools). Our plan was to have all 40 schools visited and tested by our fieldworkers during this said period. However, an incident we had neither anticipated nor planned for resulted in us losing one working day. On Tuesday 04 March 2014 teachers in all Nkangala schools freed their learners early in the morning as they went to attend a teacher union meeting. As a result of this, our fieldworkers could not access the learners. So at the end of the week we had only managed to have only 32 schools tested and the remaining 8 not tested. Our research team has arranged with the Nkangala district to complete testing of the remaining 8 schools during the week of 14 to 17 April 2014.

In Limpopo the period 19<sup>th</sup> to 26<sup>th</sup> February, 2014 was used for the baseline testing. The test was in Tshivenda--the language of instruction for learners in the schools in the district. The 20 test administrators were divided into four groups with five test administrators in each group. Each group had a leader who provided quality assurance of the test administration processes. Each group had five days to collect data from 10 schools so that on each day a team had to visit at least two schools. The HSRC team and district officials visited different schools to ensure quality assurance of the test administration processes. We manage to collect data from all the 40 schools in Limpopo involved in the project. Testing in the Free State did not take place as was planned. We are working with the district officials to reschedule dates for the testing.

From each province, the following instruments were collected:

- (1) Teacher questionnaire from Grade 1, 2 & 3 teachers
- (2) Grade 1 Written and Oral reading assessment.
- (3) Grade 2 Written and Oral reading assessment.
- (4) Grade 3 Written and Oral reading assessment.

### *3.4 TARMIIfp Software*

The final part of the software components was completed and a User Acceptance Test was conducted during the 2nd project quarter. The services of ten (4 females and 6 males) item up-loaders were secured and during the quarter further items were uploaded.

### *3.5 Item Development*

The developing the TARMII\_fp project included developing 1000 English assessment items / activities for each Foundation Phase grade (Grades 1, 2 and 3) and versioning them into other 10 other South African official languages. Foundation Phase teachers, university lecturers and subject advisors were contracted for both the development of English assessment items / activities and for versioning them into the other 10 official languages.

The process of versioning the English assessment activities or tasks into the other ten official languages of South Africa continued during this quarter. The intention was to have this overdue process concluded by the end of the first term of 2014. While from considerable versioning progress was realised from early to mid-January 2014, this plummeted significantly once the as the first term progressed and we were unable to realise our objective of completing more versioning process in for all Foundation Phase grades. Individuals (mainly teachers and literacy/language Foundation Phase specialists) contracted to do versioning simply not honouring their contracts. This occurred despite repeated attempts in talking with them regarding urgency of this part of the project. The main reason for non-delivery is that these individuals were contracted on a part-time basis whiles they held full-time jobs elsewhere. We have a meeting with the Department of Basic Education scheduled on 11<sup>th</sup> April, 2014 to demonstrate the TARMIIfp software and we intend to discuss and seek assistance from the Department on how to address this problem.

### *3.6 Loss of laptops*

Before we handed over the laptops to the schools each school signed a legal agreement to ensure the safe keeping of the laptops. We also spelt out in an event of loss or theft what procedures needed to be followed to report the incident. A total of two laptops was stolen one from the North West and one from Mpumalanga. The teachers in each of these provinces reported the cases to the police stations and HSRC TARMIIfp team. We have since filled in necessary claim forms and insurance papers and submitted them; we are currently awaiting response from the insurance company.

## Results/ Successes

The Table below gives a breakdown of the number of learners that were tested by province.

	Limpopo	North West	Mpumalanga	Free State
Male	1189	1142	929	-
Female	1123	1123	934	-
Total	2318	2265	1863	-
Target	2400	2400	2400	-
% achievement of target	97	94	78	-

In each school a random sample of 20 learners were selected for the testing. In each province three classes (Grades 1, 2 and 3) in 40 schools were involved so we expected about 2400 (20\*40\*3) learners to be tested. The table indicates that in two provinces (Limpopo and North West) we achieved over 90 percent of our target. In Mpumalanga, as we have indicated earlier in the report we could not collect data from eight schools (about 20 percent of schools we intended to collect data from). We are working with the districts in Mpumalanga and Free State to schedule date for outstanding data collection.

## Budget Overview

### HSRC Quarterly Budget Reporting

FY 2014 Q 3 (Jan-Mar 2014)

PROJECT GRAND TOTAL \$1,519,424.00 9.33

USD	A	B*	C	D	E	F=D+E	G=C-F	H=D+E	I=A-H
USAID	Approved Project Budget	Approved Current Project Year	Total funds received to date	Total previous years expenses reported to current quarter	Expenses in current quarter	All expenditures to end of current quarter	Unobligated funds on hand	Total project expenditure to-date	Total project funds remaining
Salaries	\$318,930.00	\$78,472.52	\$101,073.57	\$82,064.75	\$22,880.60	\$104,945.35	-\$3,871.78	\$104,945.35	\$213,984.65
Travel	\$50,233.00	\$29,050.54	\$29,309.00	\$26,315.02	\$4,637.92	\$30,952.94	-\$1,643.94	\$30,952.94	\$19,280.06
Other Direct Costs	\$66,928.00	\$6,163.86	\$32,274.74	\$28,285.70	\$3,793.30	\$32,079.01	\$195.73	\$32,079.01	\$34,848.99
Program	\$216,709	\$92,199.	\$89,518.	\$76,602.	\$34,158.	\$110,761	-	\$110,761	\$105,947

m	.00	70	53	27	89	.16	\$21,242.63	.16	.84
Costs									
Institutional Capacity Building	\$16,550.00	\$643.19	\$1,289.41	\$303.00	\$0.00		\$986.41		\$16,247.00
Overhead	\$90,362.00	\$27,881.52	\$34,220.70	\$28,834.96	\$8,838.55	\$37,673.50	-\$3,452.80	\$37,673.50	\$52,688.50
<b>TOTAL</b>	<b>\$759,712.00</b>	<b>\$234,411.33</b>	<b>\$287,685.95</b>	<b>\$242,405.70</b>	<b>\$74,309.26</b>	<b>\$316,714.97</b>	<b>\$29,029.02</b>	<b>\$316,714.97</b>	<b>\$442,997.03</b>

**N1**

RAND	A	B*	C	D	E	F=D+E	G=C-F	H=D+E	I=A-H
USAID	Approved Project Budget	Approved Current Project Year	Total funds received to date	Total previous years expenses reported to current quarter	Expenses in current quarter	All expenditures to end of current quarter	Unobligated funds on hand	Total project expenditure to-date	Total project funds remaining
Salaries	ZAR 2,232,510.00	ZAR 732,036.50	ZAR 942,872.02	ZAR 765,546.89	ZAR 213,443.33	ZAR 978,990.22	-ZAR 36,118.20	ZAR 978,990.22	ZAR 1,253,519.78
Travel	ZAR 351,631.00	ZAR 271,000.00	ZAR 273,411.09	ZAR 245,481.54	ZAR 43,265.20	ZAR 288,746.74	-ZAR 15,335.64	ZAR 288,746.74	ZAR 62,884.27
Other Direct Costs	ZAR 468,496.00	ZAR 57,500.00	ZAR 301,077.18	ZAR 263,865.20	ZAR 35,386.11	ZAR 299,251.31	ZAR 1,825.87	ZAR 299,251.31	ZAR 169,244.69
Program Costs	ZAR 1,516,963.00	ZAR 860,091.50	ZAR 835,079.98	ZAR 714,589.74	ZAR 318,653.60	ZAR 1,033,243.34	-ZAR 198,163.36	ZAR 1,033,243.34	ZAR 483,719.66
Institutional Capacity Building	ZAR 115,850.00	ZAR 6,000.00	ZAR 12,028.36	ZAR 2,826.56	ZAR 0.00	ZAR 2,826.56	ZAR 9,201.80	ZAR 2,826.56	ZAR 113,023.44
Overhead	ZAR 632,534.00	ZAR 260,094.78	ZAR 319,230.25	ZAR 268,988.97	ZAR 82,451.01	ZAR 351,439.98	-ZAR 32,209.72	ZAR 351,439.98	ZAR 281,094.03
<b>TOTAL</b>	<b>ZAR 5,317,984.00</b>	<b>ZAR 2,186,722.78</b>	<b>ZAR 2,683,698.89</b>	<b>ZAR 2,261,298.89</b>	<b>ZAR 693,199.25</b>	<b>ZAR 2,954,498.14</b>	<b>-ZAR 270,799.25</b>	<b>ZAR 2,954,498.14</b>	<b>ZAR 2,363,485.86</b>

**N1 - Difference in funds received to date due to USAID and ELMA each making advances payments based on own procedures but funds utilised strictly on a 50% - 50% basis (refer to F for both USAID and ELMA portions)**

## Evaluation/Conclusions

We continue to receive support from the district officials in carrying out our research activities. The districts' involvement in securing the services of the retired teachers/principals from the community helped a great deal as these teachers were able to administer the test and marked them. We intend to involve these teachers again in the test administration for the post intervention data collection.

## Future Activities

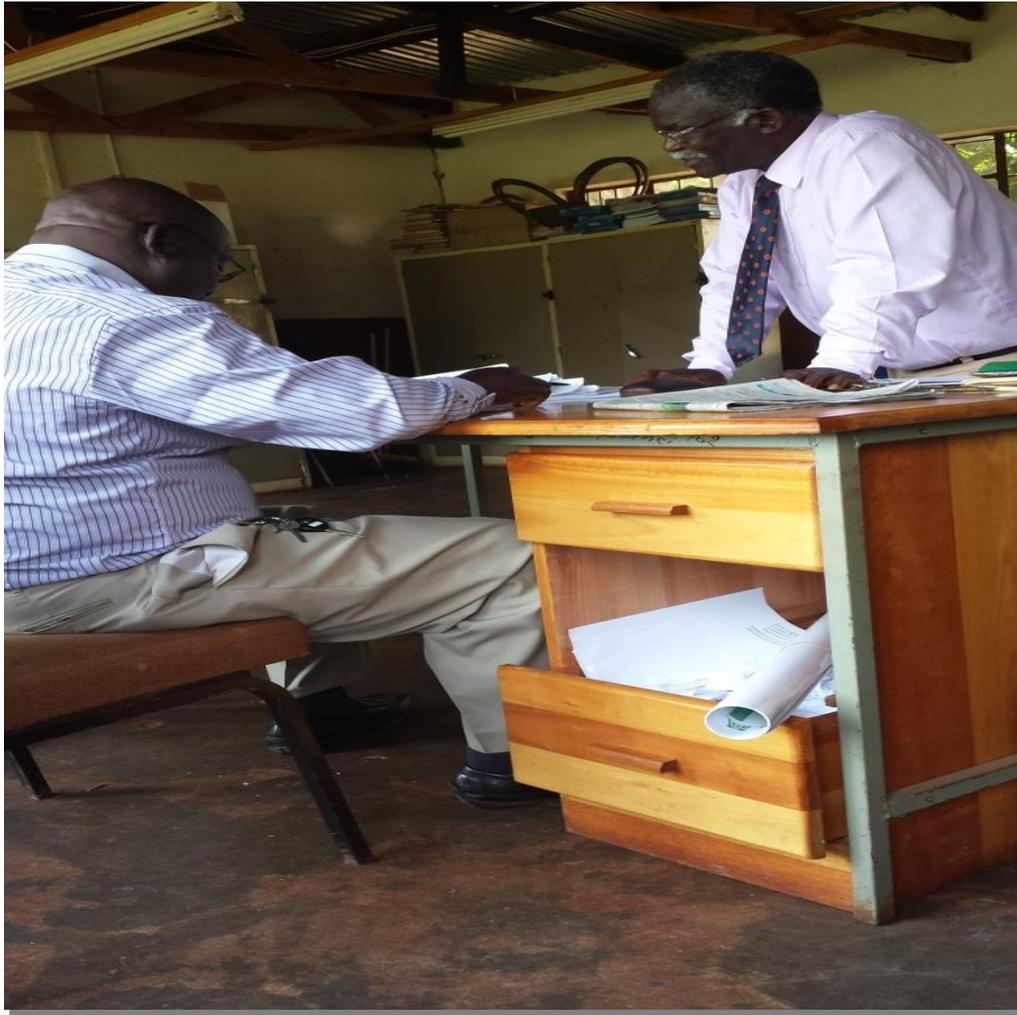
The main activities in the next quarter (April to June, 2014) would include: the capturing and analysis of the learners baseline data, the completion of the outstanding learners' baseline data collection, installation of the second version of the software on teachers' computers, and follow-up training and visit to schools. These visits would help us to assess teachers' use of the laptop and software. We would also interview teachers for the purpose of developing an understanding of the challenges and successes using the software to improve teaching and learning. We intend to have project steering committee meetings in May, 2014.

Activities	2014		
	April	May	June
Data capturing and analysis of learner baseline data			
Completion of baseline data collection in Mpumalanga and Free State			
Installation of second version of TARMIIfp software			
Training and visit to schools			
Steering committee meeting			

## Annexes

- a. See Quarterly PMP attached
- b. Budget overview (attached).
- c. Test Administration for the TARMIIfp baseline test.





### Annex a. PMP Quarterly<sup>1</sup>

PROJECT NAME: TARMIfp

PROJECT NUMBER: AID-674-A-12-00023

REPORTING PERIOD: FY (2014) – January, 2014 – March, 2014.

Indicator (Number of learners tested--baseline)	Project Baseline	FY A Target	FYA Q1 Actual	FYA Q2 Actual	FYA Q3 Actual	FYA Q4 Actual	End of Project Target
1	0	9600	6446	*	*	*	9600
<i>Dissagregated by</i>							
<i>men</i>	0	4800	3260	*	*	*	4800
<i>women</i>	0	4800	3180	*	*	*	4800
<b>Indicator/activity for which performance is deviating from plan (67% achievement—testing for about 7200 learners has been rescheduled).</b>	<b>Explanation: Test for 2400 learners in Free State reschedule due to strike action by South African courier services. Also 480 learners in eight schools in Mpumalanga could not be tested because of bad weather conditions and strike by teachers.</b>			<b>Adjustment/Mitigation/Rationale Working districts involved to reschedule dates for baseline test for learners in Free State and Mpumalanga.</b>			
<b>Challenges</b>	<b>Reasons</b>			<b>Mitigation</b>			
Could not complete the learner baseline testing in all participating schools	Strike action of courier services and bad weather			Working with districts involved to reschedule dates for the testing			

<sup>1</sup> Part of the Quarterly Narrative Report