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J.P.Morgan

**TARMIIfp Progress Quarterly  
Report**

FY 2015 (January -March 2015)

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**

The period January-March marks the beginning of the new school term. During this period, we engaged with participating districts to conduct school support, monitoring and teacher interviews. The provincial districts advised that we reschedule school visits to the next term (April-June) as schools are involved in a number of administrative issues including intake of new learners. We rescheduled school visits to the period, April-June and focused on the analysis and writing of learner post-test report as well as the writing of the project monograph.

## **Activities**

The main research activity for the current quarter entailed data analysis and writing of the learner post-test report as well as the writing of the project monograph.

## **Data analysis and preparation of data for curation**

We continued with our data analysis identifying experimental schools with significant improvement in their learners' achievement. We have prepared interviews schedules and have contacted schools and teachers to book appointments for a discussion about their experiences with the TARMIIfp project. We have also been busy preparing our data for curation. This involved removing all identification of schools, teachers and learners and providing clear definition of all variables on the data.

## **Writing of the project monograph**

During January – March the TARMIIfp research team worked on chapters of the monograph. The proposed title of the monograph is, “Developing technology to improve teaching and assessment of literacy for South African foundation phase teachers; challenges and possibilities”. The Chapters of the monograph entail (a) introduction and background, (b) TARMIIfp software development challenges, successes and functionalities; (c) development

of assessment activities; (d) Provincial/district advocacy, challenges and successes; (e) piloting the TARMIIfp software in four provinces in South Africa: lessons learnt; (f) concluding remarks and policy implications. The monograph is structured in this manner to inform future implementation of TARMIIfp in the provinces.

### Activities for the next reporting period

Activities	2015		
	April	May	June
Site visits (monitoring, support and interviews)			
Finalising writing of monograph			

### Annexes

**Annex A: PMP**

**Annex B: Budget overview**

<i>Indicators</i>	<i>Baseline</i>	<i>FY A Target</i>	<i>FY A Actual</i>	<i>FY B Target</i>	<i>FY B Actual</i>	<i>FY C Target</i>	<i>FY C Actual</i>	<i>FY D Target</i>	<i>FY D Actual</i>	<i>End of Project Target</i>
<b>Objective 1—Development of the TARMIfp software</b>										
<i>Indicator 'number of software modules developed'</i>	0	11	9	2	2	0	0			11
1. User Interface/landing page	0	1	1	0	0	0	0			1
2. Item upload module	0	1	1	0	0	0	0			1
3. Learner admin module	0	1	1	0	0	0	0			1
4. Item bank module	0	1	1	0	0	0	0			1
5. Assessment generator	0	1	1	0	0	0	0			1
6. Evaluation module	0	1	1	0	0	0	0			1
7. Diagnostic report module	0	1	1	0	0	0	0			1
8. Multi-lingual interface	0	1	0	1	0	0	0			1
9. Video player module	0	1	1	0	0	0	0			1
10. Graphic resource module	0	1	1	0	0	0	0			1
11. Remote data collection facility	0	1	0	1	1	0	0			1
<b>Objective 2---Training of teachers on the use of the updated version of TARMIfp</b>										
<i>Indicator 'number of teachers trained'</i>	0	240	225	Retraining-225	165	Retraining 60	51			
<i>Dissagregated by</i>										
<i>men</i>	0	10				3	3			

women	0	215				57	48			
<b>Indicator</b> <b>'number of</b> <b>district officials'</b>	0									
<i>Dissagregated by</i>										
men	0									
women	0									
<b>Objective 3---Learners whose teachers have access to TARMIfp</b>										
<b>Indicator</b> <b>'number of</b> <b>learners'</b>	0	7,200		2,400		2,400				12,000
<i>Dissagregated by</i>										
men	0	3,600								
women	0	3,600								
<b>Indicator 'f'</b>										
<i>Dissagregated by</i>										
men										
women										
<b>Indicator with deviation</b>			<b>Explanation</b>				<b>Adjustment/Mitigation/Rationale</b>			
Indicator a			*				*			
Indicator b			*				*			
<b>Implementation Challenges</b>			<b>Reasons</b>				<b>Mitigation</b>			
Challenge a										
Challenge b										
<b>USAID Key Issue</b>			<b>Contribution</b>							
<i>If determined relevant</i>			*							
<i>If determined relevant</i>			*							
<b>Other Comments</b>										

## Annex B: Budget overview

HSRC Quarterly Budget Reporting										
FY 2015 Q 3 (Jan-Mar 2015)		PROJECT GRAND TOTAL					\$1,519,424.00	9.935	Average exchange rate	
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 expenditure to end of current quarter	Unobligated funds on hand	Total project expenditure to-date	Total project funds remaining	
Salaries	\$318,930	\$84,608	\$173,465	\$148,755	\$12,090	\$160,845	\$12,621	\$160,845	\$158,085	
Travel	\$50,233	\$16,035	\$42,081	\$41,175	\$673	\$41,848	\$233	\$41,848	\$8,385	
Other Direct Costs	\$66,928	\$6,488	\$33,741	\$32,231	\$1,002	\$33,234	\$508	\$33,234	\$33,694	
Program Costs	\$216,709	\$75,443	\$155,515	\$141,927	\$14,043	\$155,970	-\$455	\$155,970	\$60,739	
Institutional Capacity Building	\$16,550	\$1,329	\$285	\$285	\$0	\$285	\$0	\$285	\$16,265	
Overhead	\$90,362	\$24,827	\$54,690	\$49,193	\$3,754	\$52,947	\$1,742	\$52,947	\$37,415	
<b>TOTAL</b>	<b>\$759,712</b>	<b>\$208,729</b>	<b>\$459,777</b>	<b>\$413,566</b>	<b>\$31,562</b>	<b>\$445,128</b>	<b>\$14,649</b>	<b>\$445,128</b>	<b>\$314,584</b>	
<b>N1</b>										
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	ZAR 840,578	ZAR 1,723,377	ZAR 1,477,877	ZAR 120,113	ZAR 1,597,990	ZAR 125,387	ZAR 1,597,990	ZAR 634,520	
Travel	ZAR 351,631	ZAR 159,310	ZAR 418,076	ZAR 409,076	ZAR 6,687	ZAR 415,762	ZAR 2,313	ZAR 415,762	-ZAR 64,131	
Other Direct Costs	ZAR 468,496	ZAR 64,457	ZAR 335,219	ZAR 320,219	ZAR 9,957	ZAR 330,176	ZAR 5,043	ZAR 330,176	ZAR 138,320	
Program Costs	ZAR 1,516,963	ZAR 749,528	ZAR 1,545,043	ZAR 1,410,043	ZAR 139,519	ZAR 1,549,562	-ZAR 4,519	ZAR 1,549,562	-ZAR 32,599	

Institutional Capacity Building	ZAR 115,850	ZAR 13,200	ZAR 2,827	ZAR 2,827	ZAR 0	ZAR 2,827	ZAR 0	ZAR 2,827	ZAR 113,023
Overhead	ZAR 632,534	ZAR 246,655	ZAR 543,340	ZAR 488,733	ZAR 37,297	ZAR 526,030	ZAR 17,310	ZAR 526,030	ZAR 106,504
<b>TOTAL</b>	<b>ZAR 5,317,984</b>	<b>ZAR 2,073,726</b>	<b>ZAR 4,567,882</b>	<b>ZAR 4,108,775</b>	<b>ZAR 313,573</b>	<b>ZAR 4,422,348</b>	<b>ZAR 145,535</b>	<b>ZAR 4,422,348</b>	<b>ZAR 895,636</b>

<b>USD</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=D+E</b>	<b>I=A-H</b>
<b>ELMA</b>	<b>Approved Project Budget</b>	<b>Approved Current Project Year</b>	<b>Total funds received to date</b>	<b>Total previous years expenses reported to current quarter</b>	<b>Expenses in current quarter</b>	<b>All expenditures to end of current quarter</b>	<b>Unobligated funds on hand</b>	<b>Total project expenditure to-date</b>	<b>Total project funds remaining</b>
Salaries	\$318,930	\$84,608	\$178,880	\$148,755	\$12,090	\$160,845	\$18,035	\$160,845	\$158,085
Travel	\$50,233	\$16,035	\$28,174	\$41,175	\$673	\$41,848	-\$13,674	\$41,848	\$8,385
Other Direct Costs	\$66,928	\$6,488	\$37,538	\$32,231	\$1,002	\$33,234	\$4,305	\$33,234	\$33,694
Program Costs	\$216,709	\$75,443	\$121,547	\$141,927	\$14,043	\$155,970	-\$34,423	\$155,970	\$60,739
Institutional Capacity Building	\$16,550	\$1,329	\$9,282	\$285	\$0	\$285	\$8,998	\$285	\$16,265
Overhead	\$90,362	\$24,827	\$50,682	\$49,193	\$3,754	\$52,947	-\$2,265	\$52,947	\$37,415
<b>TOTAL</b>	<b>\$759,712</b>	<b>\$208,729</b>	<b>\$426,103</b>	<b>\$413,566</b>	<b>\$31,562</b>	<b>\$445,128</b>	<b>-\$19,025</b>	<b>\$445,128</b>	<b>\$314,584</b>

**N1**

<b>RAND</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=D+E</b>	<b>I=A-H</b>
<b>ELMA</b>	<b>Approved Project Budget</b>	<b>Approved Current Project Year</b>	<b>Total funds received to date</b>	<b>Total previous years expenses reported to current quarter</b>	<b>Expenses in current quarter</b>	<b>All expenditure to end of current quarter</b>	<b>Unobligated funds on hand</b>	<b>Total project expenditure to-date</b>	<b>Total project funds remaining</b>
Salaries	ZAR 2,232,510	ZAR 840,578	ZAR 1,777,170	ZAR 1,477,877	ZAR 120,113	ZAR 1,597,990	ZAR 179,180	ZAR 1,597,990	ZAR 634,520
Travel	ZAR 351,631	ZAR 159,310	ZAR 279,913	ZAR 409,076	ZAR 6,687	ZAR 415,762	- ZAR135,849	ZAR 415,762	-ZAR 64,131
Other Direct Costs	ZAR 468,496	ZAR 64,457	ZAR 372,942	ZAR 320,219	ZAR 9,957	ZAR 330,176	ZAR 42,766	ZAR 330,176	ZAR 138,320

Program Costs	ZAR 1,516,963	ZAR 749,528	ZAR 1,207,565	ZAR 1,410,043	ZAR 139,519	ZAR 1,549,562	- ZAR341,997	ZAR 1,549,562	-ZAR 32,599
Institutional Capacity Building	ZAR 115,850	ZAR 13,200	ZAR 92,221	ZAR 2,827	ZAR 0	ZAR 2,827	ZAR 89,395	ZAR 2,827	ZAR 113,023
Overhead	ZAR 632,534	ZAR 246,655	ZAR 503,523	ZAR 488,733	ZAR 37,297	ZAR 526,030	-ZAR 22,507	ZAR 526,030	ZAR 106,504
<b>TOTAL</b>	ZAR 5,317,984	ZAR 2,073,726	ZAR 4,233,335	ZAR 4,108,775	ZAR 313,573	ZAR 4,422,348	- ZAR189,013	ZAR 4,422,348	ZAR 895,636

**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)**

