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Phase Semi – Annual Report

Grant Number: G674 – 00 – 00 – 00004 – 00

Reporting Period: November 2000 – March 2001

Project: Project for Health and Sanitation Education (PHASE)

Reg. N° 1357/87

PATRONS: Mr L.M.B. Heilbron, Bishop S. Mogoba, Mr M.F. Silberbauer

TRUSTEES: Ms T. Mahuma, Prof. R.D. Adendorff, Mr M. Ntombela,

Ms M. Padayachee, Dr M. Samuel,

Ms Y.N. Setsubi, Prof. B. Parker

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Section A: Cover Page

1. **Reporting Period**
Nov 2000 – March 2001
2. **Name of Institution**
The English Language Educational Trust
3. **Grant Number**
674-G-00-00-00004-00
4. **Postal Address**
4th Floor, 369 Smith Street, Durban 4001
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9. **Amount funded**
\$385 000
10. **Starting date of Grant**
1 December 1999
11. **Expiration date of Grant**
31 November 2002
12. **Name/ title of person preparing the report**
Tracy Brownlee (project manager)
13. **Signature**



Section B: Performance Monitoring Framework

Please refer to Attachment A

Section C: Implementation Monitoring Plan

Please refer to Attachment B

Section D: Narrative

1. Background Information

The Project for Health and Sanitation Education (PHASE) Extension Training, Grant No 674-G-00-00-0004-00 facilitates the implementation of learner-driven Action Projects in schools in Nongoma, Mahlabatini and Pongola in the Zululand Region. This will be achieved through training Language, Literacy and Communication teachers, and Human and Social Sciences teachers from Grades 6 and 8 in the schools in those Districts. Teachers will be provided with training and materials in outcomes-based education and Curriculum 2005. The programme will rely on the support and involvement of the District Education Department officials, as well as the District Health and Environmental Health officials. The implementation of the programme in schools has the following objectives:

- Improved capacity of teachers to implement Curriculum 2005, through the teacher-training programme.
- Learners' increased awareness of health, hygiene and sanitation issues, through the implementation of the learning programme.
- Improved capacity of the government officials involved to provide support to teachers in implementing Curriculum 2005.
- Learner Action Project materials developed.
- The effective management of the programme implementation.

Through the implementation of Action Projects, learners will interact with the content (health and hygiene) through participation in a research process. This process is designed to contextualise learning, making it relevant and participatory, and empowering learners to make changes in their broader environments.

2. USAID funded activities

2.1 Key Accomplishments

2.1.1 Year 1 Teacher Workshop 2 (1 day)

This workshop was the last of the Year 1 teacher workshops.

Pongola

Date: 26th Oct 2000

Number of teachers: 19

Number of schools: 14

Mahlabatini

Date: 14th and 22nd October

Number of teachers: 13

Number of schools: 11

Nongoma

Date: 14th and 21st October

Number of teachers: 36

Number of schools: 23

2.1.2 Year One Principal Workshop 2

This was only completed in Mahlabatini, and the meeting was conducted on the 18th October 2000. The other Districts ran out of time due to end of year exams in schools.

2.1.3 TST Review Workshop

The purpose of this workshop was to review the project with the TSTs and plan for 2001. The TSTs were also given certificates of attendance at the ELET TST workshops, and Dr Mbokaze addressed the teams, recognising their contributions to PHASE. This workshop was held at the Ulundi Holiday Inn on the 1st December 2000.

Present:

TSTs: 8

Guests and facilitators: 7

2.1.4 Annual Impact Assessment

The annual impact assessment for Year 1 schools was conducted by Prof J Volmink's team in 16 schools in all 3 areas between the 26th and 31st October 2000.

2.1.5 Training and Support Team Workshop 3

Dates: 14, 15, 16th February

Venue: ELET, Durban.

Participants:

Nongoma

Mr Zungu – ELET District trainer

Mrs Bassie – Schools' Health (Benedictine Hospital)

Mr Thabede – Nongoma Development Committee, and Dept of Public Works.

Mahlabatini

Mrs Mthethwa – ELET District trainer

Pongola

Mrs Mtshali – ELET District trainer

Ms Zuma – Schools' Health, Dept of Health

Trainers:

Rosebud Dlamini, Cheron Verster and Tracy Brownlee

Objectives of the workshop:

- Additional OBE training
- Preparing teacher workshops as a team
- Practising facilitation skills
- Planning the programme for the year
- Improving report writing.

The DEC officials involved in this project in the Districts were invited, but none were able to attend.

Please refer to Attachment C for the TST workshop report.

2.1.6 Baseline assessment

Prof. J Volmink's research team carried out the baseline assessment for 2001 in March. This will help to assess the impact of the project for about 15% of schools invited to participate *this* year.

The following tasks were undertaken in order for this to happen:

- Discussion and revision of the questionnaires for teachers;
- Discussion and revision of the focus of the impact assessment to better align with the PMP;
- Liaison with the District trainers to assist the field workers in getting to schools;
- Liaison with the DEC District officials for permission to go to the schools; and
- Field visits, using the District trainers for translation and getting to the schools.

The data is to be collated and analysed, and the report is expected within the next reporting cycle.

2.1.7 Principal Workshops 1

The first workshops/ meetings for school Principals and SGB members were held for the schools invited to participate in 2001. The details are as follows:

Pongola:

Date: 9 March

Number of schools invited: 24

Number of schools represented at the meeting: 14
Number of principals and SGB members: 14
TST members involved: Mrs Z Mtshali (ELET trainer)

Mahlabatini:

Dates: 20 February and 9 March
Number of schools invited: 73
Number of schools represented: 47
Number of principals and SGB members: 58
TST members involved: Mrs G Mthethwa (ELET trainer), Mrs Thusi (Mahlabatini SEM),
District Office clerk (typing and minutes).

Nongoma:

Dates: 13 February
Number of schools invited: 83
Number of schools represented: (complete report outstanding)
Number of principals and SGB members: (complete report outstanding)
TST members involved: Mr D Zungu (ELET trainer)
Mr Zungu, the ELET trainer, has not yet submitted complete reports on this meeting or the teachers' workshop. We have trouble communicating with him as he lives out of cell phone range, and we rely on him to phone the office once a week. He will not be paid until these reports are submitted.

The purpose of this workshop was to inform Principals and SGB members of the project, explain what it will involve in schools, and gain their commitment to sending teachers to the workshops and supporting the project in their schools.

Comments:

Principals seem to be very enthusiastic about PHASE, but there is a strong tendency for them to hope that ELET or USAID will be bringing actual toilets and water. The trainers are very specific that this will not happen through PHASE, but that PHASE will help them to apply to the Development Committees.

Please refer to Attachment D for the Workshop reports.

2.1.8 Teacher Workshops 1

There will be 2 Teacher Workshops for all participating schools during the course of the year. Last year, Teacher Workshop 1 was held over 3 days during the July school holidays. It was non-residential and held at local schools. The problems identified with this (as listed in previous reports) were:

- Low teacher attendance due to the poor (and unappealing) conditions of the schools and because many teachers went home (often not local) during holidays.
- Teachers arriving late and leaving early each day due to public transport limitations.
- Teachers often did not remain for the full 3 days of workshop.

- Workshops in July were not popular as teachers feel this is too late in the year, and would have preferred to start earlier in the year with project work.

With the amended project budget, we have now been able to offer residential workshops to teachers. Nongoma and Mahlabatini Districts now have their workshops together in one venue, with the teams from both Districts helping each other. Thus far, this has worked well as Nongoma has very meaningful and considerable assistance from 2 voluntary TST members during workshops, whereas Mahlabatini has no assistance at all. There has been good attendance at all the teacher workshops so far. The District trainers for Nongoma and Mahlabatini are very happy with the new arrangement and feel more supported. They are also appreciative that their complaints from last year have been attended to. The workshops now run over weekends, starting on Friday after lunch, and ending on Sunday mid- morning. As they are residential, the trainers have been able to ensure that teachers work very hard and cover 3 days of work in the time they are there. Rosebud Dlamini, the Senior Trainer for PHASE, assisted with each workshop for 1 day.

Details of the Teacher Workshops:

Pongola

Venue: Pongola Country Lodge

Trainers: Mrs Z Mtshali (ELET), Mrs Dlamini (ELET – 1 day) and Ms Zuma (Health Dept)

Dates: 16 – 18 March

Number of schools invited: 24

Number of schools represented: 22

Number of educators: 48

Number of Teacher Workshops 1 remaining: 0

Mahlabatini

Venue: KwaNzimela Conference Centre, Melmoth

Trainers: Mrs Mthethwa (ELET), Mrs Dlamini (ELET - 1 day), Mr Thabede (Nongoma Development Committee), Mrs Bassie (Benedictine Hospital, Nongoma).

Dates: 16 – 18 March

Number of schools invited: 26

Number of schools represented: 18

Number of educators: 25

Number of Teacher Workshops 1 remaining: 2

Nongoma

Venue: KwaNzimela Conference Centre, Melmoth

Trainers: Mr Zungu (ELET), Mrs Dlamini (1 day) (ELET), Mr Thabede (Nongoma Development Committee), Mrs Bassie (Benedictine Hospital, Nongoma).

Dates: 16 – 18 March

Number of schools invited: 20

Number of schools represented: 19

Number of educators: (complete report outstanding)

Number of Teacher Workshops 1 remaining: 3

Please refer to Attachment E for the trainers' Workshop reports.

2.2 Outcomes the intervention had on ELET

ELET has appointed an Assistant Co-ordinator, Mr Tyrone Gunnie, who will be assisting the Senior Trainer and the Project Manager on this project.

2.3 Overall assessment of the current state of Grant activities

Planned activities:	Status
Develop Project Implementation Plan for 2001	Complete for 1 st half of 2001
Select schools for 2001	On schedule
Inform new schools of project	On schedule
TST Workshop 3	On schedule
Materials for 2001 delivered & printed	Behind schedule
Principal meeting 1	On schedule
Pre-project impact assessment (fieldwork)	On schedule
Advocacy event	Behind schedule
Cluster visits 2 from 2000	Behind schedule all districts
Principal meeting 2 from 2000	On schedule – Mahlabatini
	Behind schedule – Nongoma, Pongola
First set of Teacher w/shop 1	On schedule

2.4 Discrepancies between planned and actual results

Behind schedule activities:

Materials printed and delivered

These are being prepared for print and will be delivered to the schools that have had workshops in March and April, by the end of May. The schools that attend workshops to be held in June will receive their materials in June.

Advocacy event

This is being co-ordinated by the new Assistant co-ordinator, Tyrone Gunnie. Mr Gunnie began duties in March and most of that month was spent in project orientation. The date has been set as the 26th May as the Provincial Minister of Education, Mrs F Gasa, is available to attend and speak on that date.

Cluster visits 2 and Principal meeting 2 from 2000

There has been a delay in finishing off work from last year, as the District trainers have been very busy with attending the TST workshop, selecting and informing new schools, liaison with the District office, organising and running the principal meetings and first set of teacher workshops. They are expected to complete this by the end of May.

2.5 Obstacles experienced

Resignation of ELET trainer in Pongola

The ELET trainer in Pongola has resigned from the project as she has been offered a teaching post by the DEC. Her resignation was handed in at the end of March, and as one month's notice is required, she has been asked to complete the unfinished work from 2000 during April (Cluster visits 2 and Principal meeting 2). We have decided not to appoint a new trainer for Pongola as the school numbers are small, and almost half of the work for the entire project has been completed. Rosebud Dlamini - the ELET Senior Trainer - with the assistance of the Nongoma and Mahlabatini trainers will conduct the workshops and cluster visits for Pongola this year. Mrs Dlamini has discussed this with the District Manager and SEM in Pongola, and they have not raised objections. We will be visiting all District offices during May, and will take that opportunity to discuss this further with them.

Communication and reports from the ELET trainer in Nongoma

The ELET trainer in Nongoma has been failing to communicate with the Durban ELET office and his TST members. As such, planning for workshops has suffered, and the volunteer members of the TST in Nongoma have had to carry a greater load than is fair to expect of volunteers. He has also failed to submit adequate reports for the Principal meeting and the Teacher workshop. He has been spoken to verbally and a letter of warning will be issued in April.

Impact Assessment report

The impact assessment report for last year (2000) does not adequately show the health and hygiene Objective as a mean score. It is therefore not possible to report on this Objective as a percentage. Prof Volmink, the researcher responsible for the report, has not been available. Waiting for the submission of this data will excessively delay the submission of this report. This Objective will be reported on in the next reporting period.

2.6 Success stories

2.6.1 For the Reporting Period

In October 2000 we recorded 236 Action Projects in 70 schools of the 100 schools that have At this point in the year, the project focus is on TST training and teacher training. We will begin to record new Action Projects and school impact for 2001 once cluster visits commence.

Training and Support Teams

The first teacher workshops for Nongoma, Pongola and Mahlabatini were well supported by the non-ELET training and support team members. In all cases, the District SEMs assisted with logistical arrangements with inviting schools and principals to meetings and workshops. The workshops were held from Friday afternoon, all of Friday evening, all day Saturday (including the evening) and part of Sunday. Two volunteer TST members supported Nongoma for the full duration of the workshop. One was Mr B Thabede from the Nongoma Development Committee and the Dept. of Public Works, and the other was Mrs T Bassie from Benedictine Hospital,

Dept. of Health. These volunteers also assisted the Mahlabatini group, as the Mahlabatini teachers' workshop was held in the same venue and at the same time as the Nongoma workshop. In Pongola, Ms N Zuma from the Dept of Health, assisted the ELET trainer. Ms Zuma also assisted for the full duration of the workshop.

Residential Workshops

The new format of running residential teachers' workshops worked well for the first set of workshops. Attendance was reasonably good and all participating teachers attended all the workshop activities for the full duration (the equivalent of 3 days). Last year, with non-residential workshops, teachers' attendance at each day was irregular with many teachers only attending part of the workshop.

2.6.2. For 2000 (Year 1 schools)

Project Goal: Learner Action Projects are implemented

In 2000, 100 schools participated in the programme.
Of those, 70 have Learner Action Projects.
There are a total of 245 Action Projects in these schools.

Comments from Impact Assessment report (2000)

Objective 1: Improved capacity of teachers to implement C2005

The impact assessment from Year One (2000) shows an improvement in teachers understanding of and attitude to OBE and C2005. This is not reflected in the Project Monitoring Plan as this is not a specific Objective. However, it reflects positively on the project. Below are some of the indicators of improvement in this field:

Question	Baseline	Impact assessment
Teachers understand the main goals of C2005	48%	59%
Teachers understand what a Critical Outcome is	47%	55%
Teachers understand what a Specific Outcome is	42%	55%
Teachers understand and know how to use continuous assessment	48%	63%
Teachers feel they have had enough training to cope with C2005	25%	37%
Percentage of teachers who DON'T know what their level of understanding of C2005 is	29%	0%

Teachers who support C2005 as a better approach for our education system	29%	86%
Believe OBE allows learners to take ownership of learning	35%	48%

<p>Indicator for Objective 1: Percentage educators using OBE materials <i>Baseline:</i> 16.3% of educators observed in lessons were using OBE materials <i>Impact:</i> 63% of educators in observed lessons were using OBE materials at the end of the project.</p>

The Impact Assessment report from Year One reflects this improvement of attitude of teachers to OBE and OBE classroom practices:

“The positive attitude and growth in understanding and confidence of teachers are indeed a tribute to the PHASE project. More importantly it has brought about a mindset change in teachers, which has made it possible for teachers to change their practice. When asked what has changed some teachers answered as follows:

- *My approach has changed because I no longer do all the talking. Instead the pupils are the ones who do their research and present answers. I only offer solutions when confused.*
- *It shows that learners are not empty vessels as traditional approaches state.*
- *It is the involvement of learners' decisions in each learning area.*
- *I first get to know what they have experienced in daily life.*
- *Now we are focusing on skills, attitudes, values and other knowledge.”*
(Prof. J Volmink, PHASE Annual Impact Assessment, December 2000).

2.7 USAID supported technical assistance

Partner Management Training Workshop on the 21st March.

2.8 USAID supported training

No training was provided for this reporting period.

3. Planning

3.1 Monitoring plan for the next reporting period (April - June 2001)

- All Teacher One Workshops complete
- All Principal Meetings from Year One complete
- All Cluster Visits 2 from Year One complete
- Materials printed and delivered
- Advocacy event

- First set of cluster visits to Year Two schools that received training in March and April
- Report on Annual Baseline Assessment for Year Two
- Visit to Districts by Senior Trainer and Project Manager
- USAID site visit

This period will incur fairly substantial costs, as the printing of materials alone will be over R100 000. The first half of this year has been planned as the busiest in the project cycle, to ensure that all teacher workshops and any catch up from last year is done before the second half of the year. We anticipate a significant decrease in costs from July until the beginning of 2002.

3.2 Possible constraints that could affect the next reporting period

The resignation of the Pongola Trainer could affect achieving all goals for Pongola.

3.3 What USAID supported technical assistance does ELET require?

Assistance with revision of the PMP.

3.4 What USAID supported training does ELET require?

Project Management training and training in using MS Project Manager.

3.5 What other relevant issues should USAID be aware of?

None that ELET is aware of.

3.6 Specify if any changes to the Grant are required.

A revised Project Monitoring Plan will be submitted to the CTO during May.

4. Financial Management

4.1 Disbursement cycle and any problems experienced with disbursements

The latest disbursement request was for actual expenditure for the period March 2001 and an advance for the month of May 2001.

4.2 Summary of vouchering system

<u>Voucher</u>	<u>Period</u>	<u>Date submitted</u>	<u>Value</u>	<u>Date received</u>
Exp + Adv	Dec 99 - March 00	10 May 2000	R85 410 24	Aug 2000
Exp + Adv	Apr - Jun 00	23 July 2000	R158 971	24 Aug 00
Exp + Adv	July 00	21 Sept 2000	R116 450	n/a
Exp + Adv	Aug 00	23 Oct 00	R26 250	n/a

Exp + Adv	Sept - Oct 2000	17 Nov 2000	R51 669	n/a
Exp + Adv	Nov 2000	15 January 2001	R50 076	22 Feb 2001
Exp + Adv	Dec 2000	26 Jan 2001	R7 452	14 March 2001
Exp + Adv	Jan 2001	28 Feb 2001	R31 283	not yet paid
Exp + Adv	Feb 2001	28 March 2001	R26 077	not yet paid
Exp + Adv	March 2001	19 April 2001	R84 891	not yet paid

The January and February 2001 vouchers have not been paid although we have confirmed that the cheques have been received by USAID. We have been told that these cheques will be deposited on 19 April 2001.

4.3 Did an audit take place? If so, provide the summary report.

No audit has been conducted to date.

4.4 Explanation of fiscal or administrative delays or deviations in financial practices

In the last month and a half (beginning March to mid April) we have had serious cash flow problems because we have incurred large USAID related expenditure but have not yet received the advance for these months.

4.5 The institutions short and long term plans for financial sustainability

ELET is and has worked to become partially financially sustainable but does not envisage becoming totally self-sustainable because of the social bottom line that needs to be maintained. For the year 2000, ELET will generate 55% of its income through self-sustainable means vis the provision of courses to teachers.

In the long term ELET will be looking to reach about 75% sustainability through courses and the selling of services. Having said this, ELET will still look to the donor community for funding of project work that benefits and uplifts the community where the community cannot afford this service.

List of Attachments

- Attachment A: Performance Monitoring Framework
- Attachment B: Implementation Monitoring Plan
- Attachment C: Training and Support Team Workshop 3
- Attachment D: Principal Meeting Reports
- Attachment E: Teacher Workshop 1 Reports