Thebe Foundation Trust
Impact Evaluation Report
15 December 2021

TSHIKULULU
SOCIAL INVESTMENTS

Acknowledgements

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Abbreviations and acronyms

ANA	Annual National Assessments
CEO	Chief Executive Office
CJC	Central Johannesburg TVET College
CAPS	Curriculum and Assessment Policy Statement
CASME	Centre for the Advancement of Science and Mathematics Education
CHE	Council on Higher Education
DBE	Department of Basic Education
DOE	Department of Education
DHET	Department of Higher Education and Training
ECD	Early Childhood Development
EFA	Education for All Goals
FGD	Focus Group Discussion
HEI	Higher Education Institutes
HOD	Head of Department
HSRC	Human Sciences Research Council
ICT	Information Communication Technology
KII	Key Informant Interviews
KPA	Key Performance Area
LiEP	The Language in Education Policy
LoLT	Language of Learning and Teaching
M&E	Monitoring and Evaluation
UNESCO	United Nations Educational Scientific Cultural Organisation
UMP	University of Mpumalanga
NASG	The National Association of School Governing Body

NDP	National Development Plan
NEET	Not in Education, Employment or Training
NSFAS	National Student Financial Aid Scheme
NYDA	National Youth Development Agency
PIRLS	Progress in International Reading Literacy Studies
POPIA	Protection of Personal Information Act
PO	Programme Officers
PSET	Post-School Education and Training
QLFS	Quarterly Labour Force Survey
SA	South Africa
SLA	Service Level Agreement
SMT	School Management Team
SPU	Sol Plaatje University
STEM	Science, Technology, Engineering and Mathematics
SWD	Students with Disabilities
TF	Thebe Foundation Trust
TIC	Thebe Investment Incoporation
TIMSS	Trends in Mathematics and Science Studies
ToC	Theory of Change
TSI	Tshikululu Social Investments
TVET	Technical and Vocational Education and Training
USAF	Universities South Africa
UCT	University of Cape Town
UJ	University of Johannesburg
UKZN	University of KwaZulu-Natal
UMP	University of Mpumalanga

UP	University of Pretoria
UWC	University of the Western Cape
TVET	Technical Vocational Education and Training
VCs	Vice Chancellors

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1. Executive summary

1.1 Overview

The Thebe Foundation was established in 2011 as an independent trust to drive Thebe Investment Corporation's (TIC's) corporate social investment strategy. Education and enterprise development are the two anchor programmes of the Foundation and were established in response to the needs of the community.

The Thebe Foundation Trust (TF) appointed Tshikululu Social Investments Management Services Pty Ltd (Tshikululu) to conduct an end-of-term evaluation of the following two programmes:

- the literacy and numeracy (Lit Num) programme (with a focus on the years 2013 to 2019); and
- the Dr Enos Mabuza Scholarship Fund (DEMSF) programme (with a focus on the years 2016 to 2021).

The main objectives of the evaluation were as follows:

- **Evaluate programme impact**: Evaluate the extent of the efficient use of financial and human resources; measure how efficiently set objectives were reached; and evaluate whether the programmes aligned with the Department of Basic Education (DBE) and Higher Education and Training (DHET) strategic plans.
- **Enhance project implementation**: Provide an opportunity to learn lessons relating to the successes, failures, and intended and unintended consequences of the programmes.
- **Promote accountability and transparency**: Allow the Thebe Foundation to promote accountability for all its social investments. If appropriate, the end-of-term evaluation findings can be shared with key stakeholders such as the DBE, DHET and other partners to promote transparency and learning.
- **Inform strategy going forward:** The strategy will be informed largely by findings from the evaluation, as well as reviewing documents in the basic education sector as informed by documents received from Thebe Foundation.

The evaluation measured the extent to which programme objectives were achieved, and how and why were they achieved (or not). It also identified any gaps between implementation and objectives. It was conducted to:

- ascertain scalability and replicability;

- identify lessons learned;
- guide funding decision-making;
- provide evidence for strategy design; and
- improve results of future interventions.

1.2 Methodology

A mixed-method approach was proposed and used to collect data. This included quantitative and qualitative data collection. Additionally, monitoring reports were sought from Thebe Foundation and its implementing partners, Maths Centre and Read Educational Trust. Although data was collected virtually, TF was in favour of on-site data collection, especially from funded schools, and the inclusion of on-site observations of how the programme was implemented.

The evaluation team used the Social Research Methods approach (Bryman's (2012), which comprises surveys, focus group discussions (FGDs), key informant interviews, document reviews and on-site observations. Of the 16 schools supported by Thebe Foundation through the Lit Num programme, six schools were visited and key informant interviews were conducted in seven schools (see Table 11 and 12). Two schools were removed from the sample because of lack of cooperation, teacher attrition and the impact of Covid-19. FGDs were conducted with between five and ten beneficiaries from two groups of students: one that had graduated from the Dr Enos Mabuza Fund Scholarship programme and another cohort that was still studying. To triangulate this data, electronic surveys were sent to students and university project managers. Additionally, key informant-interviews were conducted with:

- the consultant managing the programme;
- the current CEO;
- the former CEO;
- the chairperson;
- the project manager; and
- the Group CEO.

It is worth noting that they also provided in-depth responses on Lit Num programme (with the exception of the consultant, who is involved in the DEMSF programme only).

Using the quantitative method, the following data was collected:

- number of beneficiaries reached;
- geographical areas; and
- programme spend.

The purpose of collecting this data was to allow the evaluators to understand the depth of the strategy and measure the cost effectiveness of the programme.

The qualitative method was used to triangulate statistics. In addition, an appreciative enquiry approach was taken to measure the impact of the programme, taking into consideration the experiences of beneficiaries, implementing partners and key stakeholders (the chairperson, the current and former CEOs, the Group CEO and the project manager). The appreciative enquiry explored the elements of the programme that made it successful and identified gaps in the programme, thereby allowing the evaluators to propose recommendations based on evidence collected through the evaluation.

The data was analysed and grouped into recurring themes, which form the basis of the findings section. In addition, the challenges of implementation were analysed to determine gaps and make recommendations that can be used for scale and replication.

1.3 Evaluation findings

A qualitative and quantitative methodology were used to increase the precision and validity of the evaluation findings. The quantitative approach explored reach, demographics and spend (in rands) to measure the impact, efficiency and effectiveness of the programme.

These determinations were made based on the evidence gathered from various programme stakeholders, and corroborated with the literature review on key issues, objectives, best practices and desired outcomes in both the primary school and higher education contexts. A red-amber-green (RAG) colour-coding system was used to examine the extent to which the evaluation criteria were met. A summary of evaluation findings is presented in the tables below.

Table 1: RAG colour-coding system used in the evaluation

R	**Red**	There were a considerable number of challenges and more work is needed for improvement.
A	**Amber**	Evaluation criteria were met, but there is room for improvement.
G	**Green**	Evaluation criteria were met.

1.3.1 Literacy and Numeracy programme

Table 2: Summary of evaluation findings for the Literacy and Numeracy programme

Evaluation criterion	Rating	Comment
Relevance	**G**	The programme is relevant to the needs of the educators and learners in programme schools. There is evidence from data collected from the teachers, principals, HODs and subject advisers that the programme responded to addressing the deficiencies of learning and teaching of numeracy and literacy.
Effectiveness	**G**	The programme provided the necessary resources and capacity building initiatives to strengthen teaching and learning and the improvement of the school's capacity to manage the delivery of the curriculum and monitor learner performance. Findings from the data collected showed that teachers were equipped with new methods of teaching which were more effective and learner-centred and were able to monitor learner performance and respond to the individual needs of the learners. The resources provided by the programme created a conducive learning environment which enabled practical learning. Learning with visual aids have been enjoyable and effective for learners.

Evaluation criterion	Rating	Comment
Efficiency	**A**	There were challenges in aligning programme implementation with the school's teaching plan. Communication between the schools and the programme facilitators was not efficient. There was efficient use of financial and human resources on the Literacy and numeracy programme. The programme partners that were appointed to implement the Literacy and Numeracy programme had the requisite skills, experience, and resources to implement the programme efficiently. Additionally, resources that were available to the schools were used to implement the programme.
Impact	**G**	Findings from the schools were that learners were able to apply their mathematical skills and learners enjoy reading, read with confidence and meaning, communicate fluently and are also encouraged to learn on their own at home. There is a consensus from all the schools where data was collected that results in both mathematics and language subjects have improved.
Sustainability	**A**	The programme improved learning and teaching in the schools. Teaching became more practical, and learners coped easily with the new teaching methods according to accounts from schools, that led to improvement in learner results in mathematics and language. The learning materials provided through the programme are still being used at the schools.

Evaluation criterion	Rating	Comment
		Training of HODs was a critical element of programme sustainability. However, there were no pre- and post-assessments of the HODs training to determine the desired state of capacity to ensure that the essence of the programme is continued beyond Thebe Foundation's intervention. The programme did not have a sustainability strategy to determine the desired school's capacity scenario at the point where programme partners withdraw interventions at the schools.

1.3.2 Dr Enos Mabuza Scholarship Fund (DEMSF) programme

Table 3: Summary of evaluation findings for the Lit Num programme

Evaluation criterion	Rating	Comment
Relevance	G	The DEMSF programme is relevant to the needs of the country, as the strategy supports students from poor backgrounds and targets students taking courses for scarce but critical skills. It is also relevant to TF's strategy of building empowered communities.
Effectiveness	A	The DEMSF programme was very effective in meeting TF's strategic objectives of building and empowering communities. The DEMSF programme intentionally awarded scholarships to students from poor socio-economic backgrounds and provided them with financial and non-financial support to ensure they have access to tertiary education and are able to succeed. This is evident in the low dropout rates and high graduation rates. The gap identified in the effectiveness of the programme is students' ability to find employment after graduation. This challenge is not unique, as there the youth unemployment rate in South Africa is high (currently at 64.4%) (QLFS, Q2:2022). To address this gap, TF can use its business connections to: support students by allocating them a mentor to help them prepare for the world of work; and

Evaluation criterion	Rating	Comment
		place students in internships and workplace programmes to increase the employment of TF beneficiaries after graduation. “The Presidential Youth Employment Intervention was built on the understanding that to address the youth unemployment crisis requires innovative thinking and strong partnerships across society” (President Cyril Ramaphosa, Business Tech).
Efficiency	A	To a significant extent, the programme has used financial and human resources efficiently for management. The universities are given scholarship disbursements responsibilities by the TF, and these are guided by grant agreements to ensure that funds are used for their intended purposes in order to reach the TF’s objectives. The Scholarship Committee is responsible for budgeting and allocating scholarships to academically deserving students in line with certain criteria, which are adhered to. With regard to human resources, the programme is managed by a consultant who is responsible for designing, managing and implementing the programme. While this approach is cost effective, TF should explore increasing the number of personnel responsible for managing the strategic arm of the programme should they wish to expand the number of students placed in the programme.

Evaluation criterion	Rating	Comment
Impact	A	The current strategy has had a positive impact on the lives of the beneficiaries. The programme has addressed access and success rates. Students from poor socio-economic backgrounds had opportunities to complete their studies and get jobs in their specific sectors. While some students are still struggling to get jobs because of the country's current economic challenges, they were still able to get a formal qualification thanks to the TF's support. However, some programmatic challenges were identified. These include: • inadequate resources (such as laptops and monthly allowances); • lack of internship programmes; • unautomated data management systems; • late calls for applications; and • inadequate psychosocial support. Although these challenges had a minimal impact on the programme, addressing them will enable TF to respond to students' needs more effectively.

Evaluation criterion	Rating	Comment
Sustainability	G	The programme is sustainable to a considerable extent. Although students from poor backgrounds who enter the tertiary system will need continued support from social investors like the TF in order to access and succeed with their tertiary studies, they are able to enter the world of work or entrepreneurship when they graduate and become active economic participants. In addition, their income is able to support other family members, thereby improving their economic status.

1.4 Recommendations

The evaluation recommendations were synthesised by considering best practices gleaned from the literature review, the findings of the evaluation, and feedback from programme stakeholders and beneficiaries.

1.4.1 Literacy and Numeracy programme

Tshikululu recommends that TF develops a strategic framework for literacy and numeracy to outline what the TF's main objectives are and what problems it is trying to tackle in order to address systemic challenges within the broader education landscape.These include:

- focusing on particular primary school phases and key transition grades;
- strengthening the sustainability component of the programme through the development of programme implementation champions; and
- ensuring that there is increased parental involvement in schools.

Tshikululu also recommends that TF should have an exit strategy for each school and limit intervention to a five-year period to ensure there is sustainability beyond programme intervention.

1.4.2 Dr Enos Mabuza Scholarship Fund programme

Tshikululu recommends that TF continues funding the current institutions with the same level of interventions, as there is a huge need for those services in the tertiary education landscape.

However, there are some programmatic recommendations proposed. These are key to promoting access and success for the scholarship recipients. These recommendations are as follows:

- Automate data reporting, storage and analysis for efficient and effective monitoring and evaluation of the programme. Automated data storage, for instance, can enable year-on-year comparative data analyses to measure students' progress.
- Increase the allowance that is paid to the students to ensure they can cover all their monthly expenses.
- Review the timelines for releasing calls for proposals. The recommendation is that the call should be published earlier so that TF is able to recruit top students before they take up other scholarships. This will also allow TF to release funding early, so that all students' needs are catered for before time.
- Develop a monitoring and evaluation (M&E) plan with a full set of output and outcome indicators. These will allow TF to measure progress against these indicators and ensure

evaluations are planned and budgeted for timeously, to prevent ad hoc evaluations taking place.

- If possible, mainstream disability by intentionally targeting and increasing the number of beneficiaries who have disabilities.
- A cross-cutting emergent Theory of Change (ToC) is proposed in the recommendations section of this report. The ToC schematic has causal pathways of what the DEMSF programme will achieve for each level of results, from the output to outcome and, finally, to the impact level. TF can measure its progress against these results levels in order to measure impact.

1.5 Conclusion

The evaluation report provides an account of the extent of the impact of the Thebe Foundation strategy and how it has affected the lives of beneficiaries. The report also gives recommendations for improving and strengthening the programme and strategy in future. It concludes with the recommendation that TF continues funding both arms of the education strategy, as there is a great need for these programmes and the programmes are demonstrating impact. However, the continued funding should be enhanced approach to maximise social return on investment. There is an imperative to replicate the Literacy and Numeracy programme, and a proof of concept needs to be developed before scaling up. The proof of concept will allow the Foundation to strengthen the programme by addressing gaps identified in the first iteration of the programme. In addition, developing an M&E plan will enable a more structured implementation and effective monitoring of the programme during implementation. There have been observable gains in the DEMSF programme. However, the provision of wrap-around support, mainstreaming of disability, automating reporting systems, and the development of an M&E plan with clear output and outcome indicators, are strongly recommended.

2. Introduction

This is the final report of an end-term evaluation conducted by Tshikululu Social Investments between 25 August and 22 November 2021. The Thebe Foundation Trust (TF) appointed Tshikululu to conduct the evaluation and strategic review of its literacy and numeracy (Lit Num) and Dr Enos Mabuza Scholarship Fund (DEMSF) programmes. The evaluation assessed the programmes and their achievements, as well as reviewing and making proposals about how the strategy can be enhanced to ensure alignment with the goals of the broader education sector.

2.1 Background and context

The TF was established in 2011 by the Thebe Investment Corporation (TIC) to maximise and continue driving community development, leading to empowering communities and changing lives. The TF was established as an independent trust to drive TIC's corporate social investment strategy. Education and enterprise development are the two anchor programmes established in response to the needs of the community. Nation building is the third anchor programme, while financial sustainability is inward-facing and specifically focused on creating a financially viable foundation. TF's founding principle was to focus on redressing the imbalances brought about by Apartheid by creating economic opportunities for previously disadvantaged communities. TIC's founding fathers, Nelson Mandela, Walter Sisulu, Beyers Naude and Dr Enos Mabuza, instilled the principle of 'communities as the bottom line' to guide TIC's corporate work, bringing in a novel approach to embracing communities as integral partners and stakeholders when doing business.

In order to empower black people, the TF developed strategies that focus on strengthening the provision of education services in the country, which range from basic education up to tertiary education.

2.2 Literacy and Numeracy programme

The Literacy and Numeracy programme, implemented in 16 schools in two districts in Mpumalanga (Gert Sibande in Secunda and Nkangala in Siyabuswa), aims to improve learner performance in literacy and numeracy by producing learners who are motivated to read with meaning and who are able to write. Seven schools are located in Nkangala, while nine are in Gert Sibande. The initial strategy focused on the Foundation Phase with the principles of aiming to strengthen the Foundation Phase before the learners moved to the Intermediate Phase. However, in 2017, the strategy was extended to target the Intermediate and Senior phases in order to improve learner performance and to ensure that learners were ready for Grade 8 (high school). It is worth noting that in 2018, the intervention continued in the Intermediate Phase but only targeted Grade R in the

Foundation Phase. The strategy also grew to support heads of department (HODs) from other surrounding schools who were previously excluded from the programme.

The Maths Centre Incorporating Sciences (MCIS) has been the implementing organisation for the numeracy component of this initiative since 2013, while Read Educational Trust (RET) implemented the literacy component. It is worth noting that the MCIS and RET have developed a strategy and activities to implement the services required in the two districts. However, TF could call for funding for future iterations of programme implementation in order to appoint organisations based on capacity and skills.

The numeracy programme aims to enhance the performance of learners in mathematics by minimising learning gaps, simplifying teaching and learning for maximum impact; enabling teachers to achieve curriculum outcomes by improving their content knowledge, teaching methodology and classroom practice and management; and increasing language support and proficiency.

The literacy programme was implemented by Read Educational Trust (RET). The programme is teacher-focused because it enhances educators' skills to enable them to implement the National Curriculum and Assessment Policy Statement (CAPS) curriculum by using effective reading and writing methodologies in order to promote basic literacy, vocabulary development and competence in language learning.

A steering committee, comprising representatives from the Department of Basic Education (DBE), MCIS, RET and TF, was established with the help of TF. The purpose of the meetings of this committee was to provide quarterly updates on how the programmes were progressing, as well as to flag any challenges or provide any assistance that the MCIS and the RET needed from DBE officials.

2.3 Dr Enos Mabuza Scholarship Fund (DEMSF) programme

The DEMSF programme was established in 2016, in honour of Dr Enos Mabuza, to ensure that students from poor socio-economic backgrounds in South Africa gain access to tertiary education. The programme also aims to develop the beneficiaries to become ambassadors by encouraging them to remain connected to their communities and to contribute to the further advancement of wider society. These are students who are not only proud of their African identity and heritage, but who excelled in their studies and would not have had an opportunity to study further because of lack of financial resources for their tuition, were it not for the programme. The DEMSF programme specifically targets students who are studying scarce but critical skills courses at eight tertiary institutions in the country, namely the Sol Plaatje University (SPU), the University of Mpumalanga

(UMP), the University of Johannesburg (UJ), the University of Cape Town (UCT), the University of Western Cape (UWC), Central Johannesburg TVET College (CJC), the University of KwaZulu-Natal (UKZN) and the University of Witwatersrand (Wits). Scarce Skills refer to those occupations in which there is a scarcity of qualified and experienced people, currently or anticipated in the future, either (a) because such skilled people are not available; or (b) they are available but do not meet employment criteria. The programme started at two universities, namely the SPU and the UMP and was expanded to include the other six universities in later years.

The DEMSF programme is funded from TIC's skills development budget and this budget is reviewed annually. The support provided is offered in the form of financing studies and mentoring. Financing of studies includes paying tuition fees, accommodation costs, transport, textbooks and academic assistance. The money is paid directly to the financial aid offices of the participating higher education institutions (HEIs). These offices are responsible for managing the allocation of tuition fees and allowances through the company Fundi Capital, who disburses the allowances to the students.

TF appointed a dedicated programme consultant to design, manage and implement the DEMSF programme. This consultant is also responsible for monitoring the programme and has regular interaction with the Scholarship Committee (made up of representatives of the trustees and the CEO) to provide members with updates and feedback. In addition to these tasks, the consultant provides coaching and mentoring to the students. The Scholarship Committee is responsible for the high-level management of the programme. The role of this committee includes reviewing the selection criteria and selecting students who need to be funded on an annual basis.

2.4 Evaluation scope

The rationale for the end-term evaluation is fourfold:

- **Evaluate programme impact**: The purpose of the evaluation is primarily to evaluate the outcomes of the intervention and explore replicability and scalability. The secondary reasons for this exercise are to evaluate the extent to which financial and human resources are used; measure the efficiency with which set objectives were reached; and understand whether the programmes are aligned to a broad review of the literature, trends and the strategic plans of the DBE and Department of Higher Education and Training (DHET).
- **Enhance project implementation**: To provide an opportunity to learn lessons about the success and failures, as well as the intended and unintended consequences of the programmes.
- **Promote accountability and transparency**: To allow TF to promote accountability for all its social investments. If appropriate, the end-term evaluation findings can be shared with

key stakeholders, such as the DBE, DHET and other partners, to promote transparency and learning.

- **Inform strategy going forward:** The strategy will be largely informed by findings from this evaluation. The end-term evaluation measures the extent to which programme objectives were achieved and identifies gaps, if any, on how and why they were achieved (or not). This evaluation will be conducted in order to identify lessons learned, guide funding decision-making, provide evidence for strategy designing and improve results for future interventions.

Evaluation questions:

Relevance:

- How relevant is the programme to TF's strategic initiatives?
- What is the extent to which the programme responded to beneficiary needs?
- How relevant is the strategy in light of the needs of the education sector?

Impact:

- What is the impact of the programme on the end beneficiaries?
- What elements of the Lit Num and the DEMSF programmes made these programmes successful (or not)?
- To what extent did the strategy meet its objectives as set out in the Theory of Change (ToC)?
- Have beneficiaries been set up for future academic (or other) success?
- What lessons for scaling and replicability can we learn?
- How did the teacher-focused approach contribute to the success (or otherwise) of the Lit Num programme?

Effectiveness:

- What are the successes, spins off, gains and constraints of the education programme?
- To what extent are programme objectives achieved, or are expected to be achieved, considering their relative importance?
- What has the programme achieved to date (with a specific focus on graduation rates, employment and improving literacy and numeracy)?
- What can be done differently in the next iteration to improve the programme?

Sustainability:

- Are the outcomes of the programme sustainable beyond the programme period?
- Is the programme aligned and contributing to DBE and DHET strategies and plans?
- What are the major benefits of the programme post-intervention?

Efficiency:

- What is the cost effectiveness of the Lit Num and bursary programmes in light of TF's objectives?
- Did TF's education strategy use its financial resources efficiently?
- Did TF's education strategy use human resources efficiently?
- What lessons can be learned from the efficiency or inefficiency use of resources?

3. Methodology

This section details the methodological approach used in the evaluation. A mixed-method approach, which combines quantitative and qualitative methods, was used. The purpose of using this approach was to triangulate the quantitative findings with qualitative data to increase the validity of the evaluation. Programme monitoring documents, which consisted of both quantitative and qualitative data, were reviewed. The documents that were reviewed in the literacy and numeracy component of the programmes included MCIS and RET consolidated reports, while the scholarship programme reviewed the scholarship project plans, scholarship reports, intern concept, awardee recommendations, progress reports and results. Quantitative data included information about the sociodemographic characteristics of the beneficiaries, financial data and learner and student performance data, while qualitative data focused on processes, interventions implemented, impact, experiences challenges and, lastly, on what could be done to improve the programme. In order to explore trends in the basic and tertiary education sector, a literature review was also conducted. The results from this combination of approaches informed the findings and the recommendations of the evaluation.

TF was involved from inception to completion of the project, while Tshikululu came in as an independent evaluator with an objective assessment of the intervention to date. This involved face-to-face interaction, ad hoc email and telephonic communication, virtual focus group discussions (FGDs) and key informant interviews (KIIs), as well as the collection of electronic data using SurveyMonkey. Tshikululu designed all the data collection instruments used (refer to the appendix section).

3.1 Literature and desktop review

A literature review was conducted using Google Scholar, other relevant search engines and other sources to find reading material and previous reports on similar bursary funding projects in South Africa and beyond. This was done in order to investigate the trends, latest statistics, different strategies, challenges and successes in both the basic education and tertiary sectors.

3.2 Document review

Another methodological approach that was used as part of the study was a document review. Documents were received from TF at inception of the evaluation. These documents were used to explore the interventions of the programme and to get an understanding of the strategy that was used for implementation, in order to design data collection instruments and findings from the

document review, all of which contributed to the findings and recommendations of the evaluation. A list of the documents that were reviewed and how they contributed to the study is provided below.

3.3 Literacy and Numeracy programme

The table below provides a list of documents that were reviewed and how they contributed to the evaluation.

Table 4: List of documents reviewed: Lit Num programme

Document name	Contribution
• 2017 (MCIS) • Nkangala-Siyabuswa baseline assessment reports • Gert Sibande baseline assessment reports • MCIS Grade R and Foundation Phase improvement figures (Gert Sibande and Nkangala) • Grade R Maths Report Second Term (Gert Sibande and Nkangala) • Grades 1–3 Foundation Phase Second Term Report (Gert Sibande and Nkangala) • Grades 1–3 Foundation Phase Third Term Report (Gert Sibande and Nkangala) • Grades 1–3 Pre- and Post-Test Report (Gert Sibande and Nkangala)	Baseline assessment report, pre- and post-test reports, and overall programme progress reports
• 2017 RET • Thebe Foundation Report Final Term 1 Grades 1–3 • Thebe Foundation Term 2 Grade R Final • Thebe Foundation Grades 1–3 Term 2 Report • Thebe Foundation Term 3 Grade R Final • Thebe Foundation Term 3 Grades 1–3 Report • Year-end Assessment Report	Overall programme progress reports and assessment reports
• 2018 MCIS • Intermediate Phase District Support Proposal • Grade R Cumulative 2018 Report • Grade R Term 2 Report • Grade R Term 3 Report	Gap analysis and overall programme progress reports and activities for

Document name	Contribution
• Grade R Block Training Report • Grade R Gap Analysis Report • Grades 4–7 Block Training Report (Gert Sibande and Nkangala) • Grades 4–7 Term 2 Report • Grades 4–7 Term 3 Report • Grades 4–7 Cluster Workshop Training • Grades 4–7 Hub Formation Term 3 Report • Grades 4–7 Maps and Mirrors Report • Grades 4–7 Cumulative 2018 Report • Grades 4–7 Parents Count Report • Grades 4–7 Teacher Gap Analysis Report • Grades 4–7 Baselines Assessment Reports • Grades 4–7 Phase Meeting Report	Nkangala and Gert Sibande
• 2018 RET • Term 1 2018 Intersen Report • 2018 Baseline Assessment Report • Term 2 2018 Grade R Report • Term 2 2018 Intersen Phase Report	Baseline assessment report and overall programme process reports for Gert Sibande and Nkangala
• 2019 MCIS • Grade R And Intersen Phase Implementation Plan • Grade R Term 1 Report • Intersen Phase Term 1 Report • Grade 4–7 Pre- and Post-Test Report • Grade R End of Project Report • Intersen Phase End of Project Report • End of Project Consolidated Report	Overall programme progress reports and end of project reports for Gert Sibande and Nkangala

Document name	Contribution
• 2019 RET Term 1 Grade R Report • Term 1 Intersen Phase Report • Term 2 Grade R Report • Term 2 Intersen Phase Report • Term 3 Grade R Report • Term 3 Intersen Phase Report • Term 4 Grade R Report • Term 4 Intersen Phase Report • Intersen Phase Year-End Evaluation Report 2019 • Grade R Year-End Report 2019	Overall programme reports and end of programme reports for Gert Sibande and Nkangala

3.3.1 Dr Enos Mabuza Scholarship Fund programme

The table below shows a list of documents that on the scholarship programme and how they contributed to the evaluation.

Table 5: List of documents reviewed: DEMSF programme

Document name	Contribution
• Annual Operational Plan 2021/22	Success indicators and overall programme strategy
• TF Graduates 2018 to 2020	Employment and graduation status of TF graduates
• DEMSF 2018 Project Plan • 2021 TF Scholarship Project Plan	Purpose and key performance areas (KPAs) of the programme
• DEMSF 2019 Bursary Recommendation	Recruitment and shortlisting process
• DEMSF Report 2018 • DEMSF 2019 December • TF Scholarship Report 13 Feb 2021 • TF Tertiary Education Report 27 August 2021	Operational and financial overview of TF investment in the programme, as well as tracking of the students' academic progress

Document name	Contribution
• Education Intern Programme 2021	TF strategic overview and alignment of all programmes
• 2020 Thebe Impact Report	Programme overview and 2020 highlights
• Student Scholarship Agreement	Scholarship terms and conditions

3.4 Qualitative data sources

To gain insights into the impact that the strategy has made, qualitative data was collected from various stakeholders in the programme. This section details the sources of qualitative data.

3.4.1 Literacy and numeracy

Qualitative study methodology was used, whereby data was collected from the school principals, literacy and numeracy HODs, teachers, subject advisers and learners.

3.4.2 Key informant interviews with schools and services providers

KIIs were conducted with key informants from the schools in order to collect qualitative data on the extent to which programme outcomes were reached, to understand their perspective on their experiences of the programme, how the programme aligned to educational objectives of the school, how the school was able to benefit from the programme, and how the programme at the schools, and in the education sector in the country at large, could be improved to achieve the desired education outcomes. The below is a list of key informants who were interviewed.

Table 6: List of programme schools respondents

Respondents' designation	Type of interview	Objective
School principals	KII	To understand the alignment of the programme with the school curriculum and impact of the programme in the school

Respondents' designation	Type of interview	Objective
Numeracy HODs	KII	To understand the impact of the programme on each subject area and improvement on school management
Literacy HODs	KII	

Interviews were also held with service providers from the RET and MCIS to (a) understand their perspective of the objectives of the programme; (b) know what activities were conducted at the schools to achieve the intended outcomes; (c) understand whether the programme was aligned to the objectives of the TF, schools and the DBE; and (d) canvass their view on the impact the programme has had on its beneficiaries.

Table 7: List of service provider respondents

Respondents' designation	Type of interview	Objective
MCIS operations manager	KII	To understand programme implementation strategy, sectoral alignment, intended outcomes, activities and outcomes achieved
RET training manager	KII	
RET fundraising and public relations manager	KII	

In order to triangulate findings from the service providers, additional data was collected from key informants from TF, namely the CEO, the former CEO, the project manager, the chairperson and the Group CEO. The data collected enabled the evaluators to not only pick recurring themes but also to be able to explore the extent to which goals were reached with the Lit Num programme. Based on the challenges identified from all groups, recommendations that can be used in the next iteration of programme implementation were drawn. The qualitative data provided in-depth insights into the quantitative data in relation to spend, the number of schools in the programme, learner

performance, student performance, the number of beneficiaries reached, training programmes and money spent in rand value.

Table 8: List of TF respondents

Respondent's designation	Type of interview	Objective
TF CEO	KII	To understand the objectives of TF in intervening in basic education in Mpumalanga to improve literacy and numeracy, and to understand their perspective on the outcomes of the programme
TF Former CEO	KII	
TF Project Manager	KII	
TF Chairperson		
TF Group CEO		

Interviews were also conducted with subject-matter and education specialists who have worked on the programme in various capacities to understand their perspective of the programme outcomes.

Table 9: List of subject advisory respondents

Respondent's designation	Type of interview	Objective
Chief Education Specialist Programme coordinator for early childhood development (ECD) up to Grade 9	KII	To understand the objectives of TF in intervening in basic education in Mpumalanga to improve literacy and numeracy, and to understand their perspective on the outcomes of the programme
Deputy chief education specialist for ECD and Foundation Phase, responsible for supporting and strengthening implementation and monitoring and evaluation	KII	

3.4.2.1 Focus group discussions

FGDs were held with the teachers and learners from both the Foundation and Intermediate phases to understand how the programme had an impact on improving teaching methods and how the programme contributed to effective learning. Each FGD included numeracy and literacy teachers from different grades, as well as learners of different ages and grades. All FGDs were held on the school premises with 12 HODs, 27 teachers and 35 students participating across the six schools, with an average of six students and seven teachers per respective FGD.

Table 10: Teacher and learner FGD participants

Respondents' designation	Type of interview	Objective
Learners	FGD	To understand how learners have been affected by the programme to improve their literacy and numeracy skills
Teachers	FGD	To understand how the programme has had an effect on improving teaching and learning in class

3.4.2.2 On-site observation

Below are photographs taken at the various schools while conducting FGDs with teachers and learners, and from the KIIs with principals and HODs in the libraries and offices of the schools, with visuals of various learning materials and other learning aids, such as wall charts, that were provided to the schools by the programme.

Figure 1: Tshikululu staff conducting an FGD with learners in the Tholukwazi Primary School library in Mbalenhle, Secunda

Figure 2: Tshikululu staff member with an senior management team member at Velangezwi Primary School in Siyabuswa, Nkangala

The first picture was taken in the school library where a FGD was being conducted with learners. The library is open to all learners at the school and is equipped with books. The second picture was taken in a room that serves as a multiple purpose facility. It was an evaluation finding that the resources provided to the schools have been helpful in assisting the schools in improving learner performance. Although an inventory check will not be performed as part of the evaluation going forward, the schools should maintain the resources given to them as part of the programme and should continue using them effectively to ensure the sustainability of the programme.

The senior management team (SMT) member interviewed cited a lack of space and the need for more classrooms to be built. The room is used for board meetings, Foundation and Intermediate Phase readings, corners/story time and is also shared by the HODs to do their administration work. There is insufficient space in several classrooms to fit reading corners in, given a large number of learners who must be accommodated, and the fact schools have had to make space available to comply with Covid-19 restrictions.

3.4.3 Dr Enos Mabuza Scholarship Fund programme

Qualitative and quantitative methodology was used to increase the precision and validity of the evaluation findings. The quantitative approach explored reach, demographics and spend in rand value in order to measure the impact, efficiency and effectiveness of the programme. Both the project administrators from the financial aid offices and the beneficiaries were interviewed to gain an understanding of the fund disbursement processes of the former, and the experiences of the latter. Structured questionnaires were sent out on SurveyMonkey to current and past beneficiaries from all participating institutions. In addition, FGDs were conducted with the students who were still studying, with 10 students in attendance, and those who had graduated, with five students in attendance.

3.4.3.1 Key informant interviews

KIIs were conducted with five key informants in order to collect qualitative data on the extent to which programme outcomes were reached. Below is a list of key informants who were interviewed:

- Programme consultant;
- TF CEO;
- TF Group CEO;
- Former TF CEO; and
- Chairperson.

In these virtual interviews the key informants responded to the open-ended questions contained in the qualitative survey instrument (questionnaire) designed to allow free responses (see Appendix B). The hour-long interviews were recorded and transcribed. The initial data was cleaned and analysed and recurring themes were identified in order to form the basis of the evaluation findings and the recommendations.

3.4.3.2 Electronic surveys

Electronic surveys were sent out to the project administrators of the DEMSF programme. Project administrators are personnel from the financial aid offices of the HEIs involved who are responsible for managing the bursary programme at institution level. The main purpose of the surveys was to collect data on:

- Selection criteria;
- Disbursement mechanisms;
- Support interventions;
- Relationships between institutions and the TF;
- Challenges;
- What can be done to improve the programme; and
- Outcomes.

3.4.3.3 Focus group discussions

FGDs were conducted with two different groups of students – those who had graduated and those who are still studying. The purpose of designing the FGDs in this way was to get a balanced and in-depth view of the impact of the programme on the end beneficiaries. However, a concern was that only students who had been able to find employment attended the FGDs; those who were not in employment were invited but did not respond.

The one-and-a-half hour-long FGDs were recorded, with approval from the participants, and transcribed. The findings were collated, analysed and integrated into the findings from the electronic surveys.

3.5 Quantitative data sources

The section below details the quantitative data collected from the evaluation.

3.5.1 Literacy and Numeracy programme

The quantitative data used to analyse teacher progression and learner performance was obtained from the document review process. The MCIS end of year reports (2017, 2018 and 2019) tracked teacher and learner progression, as did their 2019 end of project report. RET provided end-of-term reports (2017, 2018 and 2019) and an end of project report that only tracked learner progression. This quantitative data was used to review the number of schools supported versus the amount spent.

3.5.2 Dr Enos Mabuza Scholarship Fund programme

The quantitative survey, targeting both current and former beneficiaries from 2016 to 2020, was conducted using databases provided by TF.

In addition to the quantitative survey, quantitative monitoring data was received from TF pertaining to student performance and progression.

3.5.2.1 Questionnaires: students

SurveyMonkey was used to collect questionnaire responses from students. The first survey link was sent out on 4 October 2021 and a follow-up sent out on 8 October 2021. Respondents were asked to email the questionnaires back within a week. As very few students responded within this timeframe, follow-up telephone calls were made and emails sent every third day to track and request respondents to respond to the surveys. A total of 49 respondents were reached.

A structured questionnaire (Appendix C) was designed to measure the key characteristics of the respondents that influenced their perception of the programme and the impact of the programme on them, namely their knowledge, attitudes and perceptions of the DEMSF programme. Measures in the questionnaire included the following:

1. Sociodemographic information (gender, age, province, household size, settlement type, race, employment status, disability and marital status);
2. Awareness of the DEMSF programme;
3. Application and selection process;
4. Funding (what it covered and whether they received any other funding);
5. Courses undertaken and academic performance;
6. Exposure to DEMSF programme and support interventions;
7. Challenges identified and ways of improving them; and,
8. Impact of the DEMSF programme.

The quantitative monitoring data that was received from TF, as set out in Table 5, was reviewed and analysed. The data received reported on student performance, with a specific focus on modules passed on average, modules passed with distinctions, total number of graduates and ad hoc dropout numbers. The provided data, however, was missing essential information on the programme's year-on-year statistics, i.e., throughput, dropouts and graduation rates. This information is vital for the successful running and management of the scholarship programme, for measuring the programme's return on investment (ROI) and for re-evaluating the scalability and impact of the programme. The need to close this data gap is explained in the recommendations section of this evaluation report. The data is further analysed in detail in the report.

The data gaps that were identified by this monitoring of the data limited the evaluation since the true student performance and throughput rates could not be measured in detail; actual employment data was not clear enough to paint a picture of how long it took for the employed graduates to find work; and the dropout data was not sufficiently consistent. To examine the possibility of scaling the programme, the quantitative monitoring of data needs to be strengthened. The programme should record, update and make available the following information every year:

- Academic progress (qualification year progress, repeats, etc.).
- Extended year programme data;
- Dropout data;
- Graduate cohort for the specific year;
- Number of graduates with confirmed employment (within 3, 6, 12+ months of qualification completion); and
- Annual update data on alumni (e.g., employment status to track previous year's unemployed graduates and establish whether they have found employment, salary bands for those employed, sector they are employed in, etc.).

3.6 Sampling

The following section discusses and tabulates the samples from the evaluation for (i) the Lit Num programme; and (ii) the DEMSF programme.

3.6.1 Literacy and Numeracy programme

A non-probability, purposive sampling technique was employed to gather the responses of the respondents for evaluation. This process was done in consultation with TF. This non-probability sampling was more convenient because it provides the evaluators with an opportunity to use different criteria for selecting the respondents for the study as explained in the table below. The non-probability sampling technique also meant that all schools had a fair chance of getting selected for on-site or telephonic data collection.

Table 11: First sample size – Gert Sibande – Secunda

Gert Sibande – Secunda	Comments	Nature of Interview
Mbalenhle Primary School	Two FGDs conducted with seven learners and five teachers separately	Physical site visit

Gert Sibande – Secunda	Comments	Nature of Interview
	Three KIIs with the school principal, numeracy and literacy HODs	
Shapeve Primary School	Two FGDs conducted with five learners and eight teachers separately Three KIIs with the school principal, numeracy and literacy HODs	Physical site visit
Maphala-Gulube Primary School	Two FGDs conducted with four learners and seven teachers separately Three KIIs with the school principal, numeracy and literacy HODs	Physical site visit
Tholukwazi Primary School	Two FGDs conducted with six learners and two teachers separately Three KIIs with the school principal, numeracy and literacy HODs	Physical site visit
Zamokhule Primary School	Three KIIs with the school principal, numeracy and literacy HODs	Telephonic Interviews
Lifalethu Primary School	The school did not respond to requests for data collection and was not reachable telephonically	Not Applicable
Buyani Primary School	These schools were not sampled for KIIs and FGDs and were targeted for the document review process for learner performance monitoring but could not be reached. Since these schools could not be reached, the gap was filled	Not applicable
Allan Makhunga Primary School		Not applicable
Osizweni Primary School		Not applicable

Gert Sibande – Secunda	Comments	Nature of Interview
	with data collected from the implementing partners.	

Besides the fact that one school out of the six schools sampled could not be reached for KIIs as planned, the sample sizes from Gert Sibande were still significant because 85% of all the schools were sampled using KIIs. Virtual data collection was only conducted in one out of the five schools in Gert Sibande, with four of the schools being physically visited for data collection purposes in Mbalenhle, Secunda.

Table 12: Second sample size - Nkangala – Siyabuswa

Nkangala District – Siyabuswa	Comments	Nature of interview
Phakgamang Primary School	School taken out of the sample mix because of a lack of cooperation from the school	Not applicable
Sithabile Primary School	School taken out of the sample mix because of Covid-19-related issues and most teachers who were part of the programme during implementation had left the school	Not applicable
Ramokgeletsane Primary School	Two FGDs conducted with five learners and six teachers separately Three KIIs with the school principal, numeracy and literacy HODs	Physical site visit
Makopanong Primary	Two KIIs with the school principal, numeracy and literacy HODs Other groups were not available for telephonic interviews	Telephonic interview
Sibonelo Primary	No response on data collection Telephone and email requests to the school were unsuccessful	Not applicable

Nkangala District – Siyabuswa	Comments	Nature of interview
Velangezwi Primary (Multigrade)	Two FGDs conducted separately with five teachers and eight learners Three KIIs with the school principal and Foundation Phase HOD conducted	Physical site visit
Thulasizwe Primary	Two KII conducted with the principal and the Foundation Phase HODs	Telephonic interview

Seven schools were targeted for telephonic and physical data collection, and four out the seven schools were successfully engaged with. Reasons for not achieving the target sample size and some of the challenges encountered are listed above. While it would have been ideal to interview all the schools that participated in the programme, this was not a study limitation since six schools were reached for on-site data collection and another three reached for telephonic interviews, giving a total of nine participating schools. A total of nine school principals, 12 HODs, 27 teachers and 35 learners were reached.

3.6.2 Dr Enos Mabuza Scholarship Fund programme

A purposive sampling technique was used for evaluation of the DEMSF programme because there are eight HEIs funded, thus all institutions were purposefully targeted to be part of the evaluation.

While all eight participating institutions were targeted in the initial sample, only three responded despite continuous follow-ups. The low response rate is a study limitation because the experiences of these three institutions might be different from those of the remaining five institutions. In addition, qualitative data was collected from key informants working closely with the scholarship programme, namely the programme consultant, the current CEO, the chairperson, the Group CEO and the former CEO.

Table 13 tabulates how data was collected per each participating university.

Table 13: Institutional data collection methods

Institution name	Data collection technique	Comments
1. Sol Plaatje University (SPU)	One FGD with programme beneficiaries that had graduated from the programme Surveys sent out to all beneficiaries KII with the project manager	Five FGD graduates were in attendance Surveys sent to project administrator[1] with no response received from SPU
2. University of Mpumalanga (UMP)	One FGD with programme beneficiaries who are still in the system Surveys sent out to all beneficiaries KII with the project manager	One FGD conducted with 10 students Surveys sent to project administrator, with no response received from UMP
3. University of Cape Town (UCT)	Surveys sent out to all beneficiaries KII with the project manager	Surveys sent out to all bursary beneficiaries Surveys sent out to project administrator, and a response was received from UCT
4. University of the Witwatersrand (WITS)	Surveys sent out to all beneficiaries KII with the project manager	Surveys sent out to all bursary beneficiaries Surveys sent out to the project administrator, with no response received from Wits
5. University of Johannesburg (UJ)	Surveys sent out to all beneficiaries	Surveys sent out to all bursary beneficiaries

[1] Project Administrators in this report are the Universities personnel that were responsible for managing the programme at the Universities level.

Institution name	Data collection technique	Comments
		Surveys sent out to the project administrator, with no response received from CJC
6. Central Johannesburg TVET College (CJC)	Surveys sent out to all beneficiaries KII with the project manager	Surveys sent out to all bursary beneficiaries Surveys sent out to the project administrator, with no response received from CJC
7. University of Kwa-Zulu Natal (UKZN)	Surveys sent out to all beneficiaries KII with the project manager	Surveys sent out to all bursary beneficiaries Surveys sent out to the project administrator, with a response received from UKZN
8. University of the Western Cape (UWC)	Surveys sent out to all project bursary beneficiaries KII with the project manager	Surveys sent out to all bursary beneficiaries Surveys sent out to the project administrator and a response received

3.7 Data quality

Throughout data collection, data quality was ensured. Questionnaires were checked for accuracy, consistency and completeness as soon as they were received on SurveyMonkey. It was encouraging to note that most respondents understood the questionnaire; however, some questions were not applicable to everyone. This was considered during data analysis.

Data confidentiality and integrity was ensured. The beneficiaries were assured of confidentiality, and it was emphasised by email and telephonically that the information obtained would in no way be used to penalise the respondents or to determine whether they should continue getting funding or not. Direct quotes from students does not identify them by their names not just for Protection of Personal Information Act (POPIA) purposes but also to ensure confidentiality. All questionnaires received were kept on a central SharePoint portal and only accessed by the evaluation team.

3.7.1 Data analysis of the quantitative data

As soon as questionnaires were received, they were exported from SurveyMonkey to Microsoft Excel for analysis. The lead evaluation specialist checked all the data that was captured in order to ensure data quality. She checked the database for consistency and any missing information. The data was then analysed using power pivots for data analysis and accuracy purposes. Descriptive analysis was conducted to describe the data and explore associations. Since most variables were categorical, tests of association were conducted to assess the relationships between some variables. For easy reference, data was converted into visuals under the findings section.

3.7.2 Data analysis of the qualitative data

The main facilitators recorded interviews and FGDs during data collection, while co-facilitators probed themes and captured high-level findings. Qualitative data, which was in the form of unstructured text, was uploaded centrally to the SharePoint portal soon after collection and collation. Data was then analysed by the evaluation team in order to draw common themes and findings. Similar themes were coded using predefined categories, namely impact, relevance, efficiency, effectiveness and sustainability. The analysis focused on exploring the experiences of beneficiaries, implementers and managers of the programme and their thoughts, which allowed the evaluation team to systematically structure findings. It was also through this process that the evaluation team was able to pick up programmatic implementation constraints' and what could be done differently in the next iteration of the programme for replicability and scalability.

3.8 Limitations of the evaluation

The following limited the evaluation:

1. Insufficient contact information: Some of the contact details for current beneficiaries did not contain correct and current emails. It was, therefore, impossible to include these respondents. Some emails bounced back, while others were sent but no response was received.
2. Insufficient quantitative data:
    i) Lit Num programme: RET's termly reports, and their end of project report did not contain a quantitative data analysis of teacher progression. Their data was largely focused on learner performance. A learner progression data analysis was only provided in the term 4 reports. The quantitative data on literacy Intersen performance only focused on Grades 4 and 6 learners, no data for Grades 5 and 7 were provided. RET only provided details of the data from interventions for 2019; data were not included in their 2017 and 2018 reports. No details of the planned versus actual activities were provided in their reports. MCIS's overall Grade R numeracy

performance report included a sample of nine schools. MCIS's overall Intersen numeracy data did not indicate the number of schools that formed the basis for the school-based results. The MCIS's pre- and post-test of tracked learners only included a small sample of five learners and did not describe how the learners were selected.

In addition to the above explained limitation, no n (total) numbers of learners assessed were provided but rather the average performance.

i) DEMSF programme: The programme provided insufficient programme reports for scholarship tracking data, i.e., throughput statistics, year-on-year academic tracking, pass rates, year-on-year graduation rates (completion on time vs needing extra time), dropout data, year-on-year employment tracking (jobs within 3, 6, 12 and 24 months of graduating) and the types of jobs secured. Documents received, as indicated in Table 5, had extensive gaps of information in them and this information is crucial for evaluation purposes.

3. Given the lack of quantitative data, both components of the programme relied quite heavily on self-reported qualitative data. Although this type of data is valuable, it may be prone to recall bias.
4. Sithabile Primary School was removed from the sample because the school was affected by Covid-19 so the team could not undertake a field visit. In addition, most teachers who were part of the Lit Num programme had left the school. In addition, a principal from Phakgamang Primary School did not cooperate with the team and did not want learners to attend FGDs, so the school was removed from the sample.
5. FGDs at Maphala-Gulube and Mbalenhle primary schools were attended by a limited number of respondents because the interviews were conducted in the final week of the school term. Some of the teachers were not available to participate in FGDs because they had to prioritise compiling school reports for the quarter. The ideal number of respondents for FGDs is between six and eight and these schools provided two and five respondents, respectively.
6. The overall timeline for the evaluation – 10 working weeks – was extremely tight, considering the need to get approval from the DBE, the substantial sample sizes and the scope of activity that needed to be completed.
7. Eight institutions were invited to complete surveys relating to the scholarship programme. However, only three institutions responded. Follow-ups were made by the programme consultant but no responses were received. Therefore, the representativity of the tertiary institutions is weaker than hoped for.

3.9 Ethical considerations

1. All virtual interviews with respondents were recorded with their consent.

2. After each interview, a verbal summary was provided to the respondents to ensure that themes were captured properly.
3. The terms and conditions of the FGDs and interviews were explained to the participants at the beginning of each session. Anonymity was guaranteed. This guarantee has been honoured and their names have not been disclosed in this report.
4. Data collection was undertaken at no cost to the respondents because Tshikululu used office phones and internet data to conduct FGDs and interviews. However, the respondents used their own data to join Microsoft teams' interviews.
5. All Covid-19 protocols were observed during on-site data collection.
6. In accordance with the POPIA, respondents have been anonymised in the evaluation report. The respondents were also informed before interviews that their names would be anonymised.

4. Literature review

This literature review focuses on basic and tertiary education and the important educational reform milestones in South Africa, as well as how South Africa performs in this sector compared to other countries. The purpose of the literature review is not only to provide context but also to provide an understanding of, and background to, the themes that are explored in the evaluation. Furthermore, challenges are explored using the relevant literature and how these challenges have impacted on the education sector.

4.1 Literacy and numeracy

The section discusses the relevant literature on the basic education sector in South Africa and how the country is performing in terms of international literacy and numeracy indicators. The latest trends and studies from the past decade will be explored in order to acquire a good understanding of the challenges faced by the basic education sector, as well as the progress that has been made. It is clear from the literature published by various authors that, in order to address the systemic barriers in basic education – and particularly to improve literacy and numeracy in South Africa, there is a need for an improvement in the quality of education. The reasons for poor learner outcomes are extensive and include weak institutional functionality; wasted teaching and learning time; ill-equipped school leadership; educators with poor content knowledge, pedagogical skills and accountability; and a lack of access to resources and educator support material, such as textbooks, workbooks, tools and methodologies. There is little support from parents, school governing bodies (SGBs) and local communities, all of which is paramount for the improvement of learner performance.

4.2 Sociodemographic characteristics in Mpumalanga

The Lit Num programme is offered in Mpumalanga and this section describes the sociodemographic characteristics of the province. The purpose of this section is to provide a context of the province and the reasons why TF invested in the province. Population statistics from a community survey conducted by Statistics South Africa in 2016 indicate that Mpumalanga is dominated by black Africans (93.6%), followed by whites (5.2%), while the population of coloureds and Indians/Asians is below 1%. A large proportion of the white population is found in Nkangala (7.7%) compared to the other two districts, Gert Sibande and Ehlanzeni. At the local municipality level, the largest proportion of the white population is found in the Steve Tshwete and Thaba Chweu municipalities, each at 14,4%. The Steve Tshwete Municipality is also home to a large proportion

of the coloured community (2.3%) compared to other local municipalities, while large proportions of Indians/Asians reside in the Steve Tshwete Municipality.

Census 2011 results show the following language variations in Mpumalanga among persons aged one year and older: siSwati (27.7%) and isiZulu (24.1%), the two most dominant languages in the province. Census 2016 shows that the two languages, siSwati (29.1%) and isiZulu (28.8%), were still the two most dominant languages at that time. Xitsonga and isiNdebele follow siSwati and isiZulu, with just over 10% of the population of the province speaking these two languages, in the same proportion as both Census 2011 and Census 2016.

4.2.1 Population distribution by age

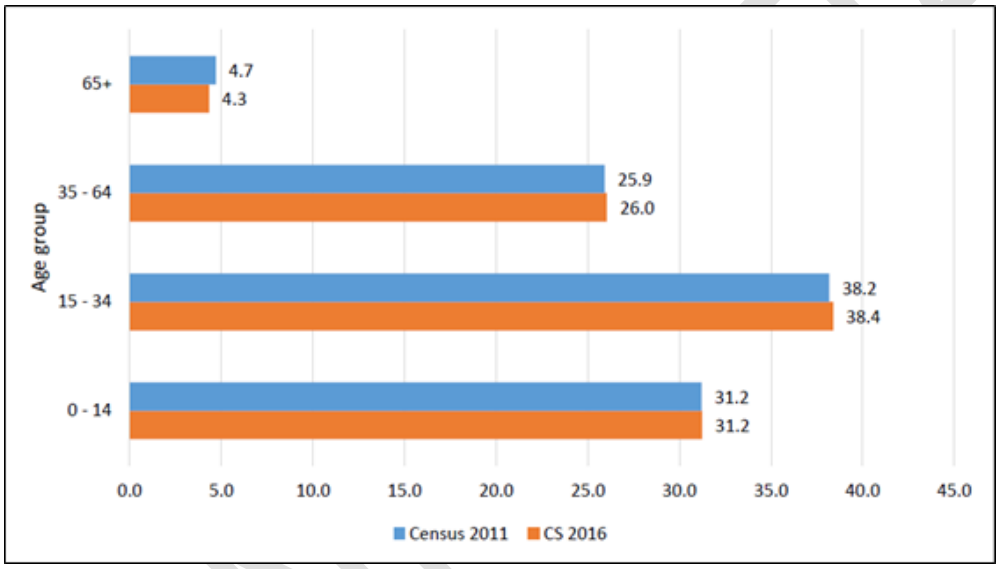


Figure 3: Percentage distribution of population by broad age group (Census 2011 & Census 2016)

The figure above shows the distribution of Mpumalanga's population by age group. Mpumalanga is dominated by persons in the age group 15–34 (38.4%), followed by those in the age group 0–14 (31.2%) and 35–64 (26.0%), respectively, while the lowest proportion of the province's population is aged 65 and older (4.3%).

4.2.2 Basic education

According to Stats SA (2016), in Gert Sibande 70% of children aged 0–4 years do not attend preschool, followed by Ehlanzeni with 67.1% and, lastly, Nkangala, with 65.7% of children aged 0–4 not attending preschool. There has also been a decline in school attendance among children aged 5–6 years. A consistent decline in attendance is observed among children aged 7–16 and 20–24, while a decrease is evident among those aged 17–19, as shown in Figure 42 below.

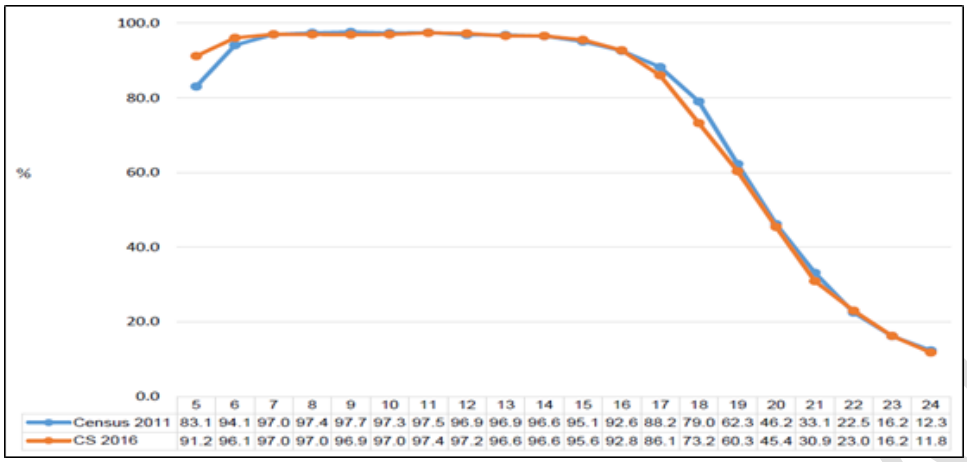


Figure 4: School attendance by single ages for persons, 5–24 years in Mpumalanga (Stats SA, CS 2016)

4.2.3 Mpumalanga Department of Education

According to the 2018/19 annual performance of the Mpumalanga Department of Education, there has been a great deal of focus on learner performance at the Grade 12 level for many years. This has created a great deal of interest in the Senior Certificate and National Senior Certificate examination results. However, over the last few years there has been a realisation that, to improve Grade 12 results, the performance of learners in the lower grades must improve. Therefore, in Action Plan to 2019: Towards the Realisation of Schooling 2030 (which has 27 goals), the first three goals relate to outputs in Grades 3, 6 and 9.

The objective of the action plan is to use the Maths, Science and Technology Academy as a vehicle by department to stimulate interest in maths and science from the Foundation and Intermediate phases. This will also assist the department to improve maths performance in Grades 3, 6 and 9. Primary school educators will be trained in the utilisation of e-resources. The report added that, in order for the department to realise holistic improvement in these areas, there needs to be a concerted effort towards improving the quality of teaching and learning in the classroom, the effective use of teaching time and the quality of assessments.

In its 2018/19 annual report, the Mpumalanga Department of Education reported heeding the call prescribed in the country's Constitution (Constitution of the Republic of South Africa Act 106 of 1996), specifically on access to education, equity, redress and poverty alleviation. The department prides itself for having increased access to education for all learners of school-going age.

The department also reported its continued commitment to transforming the school systems and the following are some of the significant achievements which have been reported to date:

- Increased Grade R learner enrolment and professionalisation of the ECD sector by enrolling practitioners in higher education learning and absorbing those who qualify for level 1 teaching posts.
- Administered Grades 3, 6 and 9 provincial assessments to improve learner performance.
- Improved the performance in mathematics across the education system.
- Obtained a 4,2% improvement in the Grade 12 pass rate to achieve a 79% pass rate in 2018.
- Improved school sanitation and eradicated pit toilets.
- Improved the reading efficiency of learners by working with a range of stakeholders.
- Provided workbooks and textbooks to improve teaching and learning.

Notable challenges faced by the department were:

- Learner migration to the province.
- A shortage of information and communication technology (ICT) in schools.
- The complexity of the exam papers and the introduction of additional content (e.g., geometry and data handling in mathematics) contributing to poor learner performance.
- Lack of maintenance of school infrastructure by some SGBs.
- Ongoing service delivery protests in communities that often affect teaching and learning programmes and, at times, lead to destruction of school infrastructure.

Medium to long-term department goals:

- Resourcing of technical high schools to improve mathematics and technology success rate.
- Development of teachers' pedagogical content knowledge and increase classroom support.
- Construction of six schools in five fast growing towns and the provision of specialised ECD classrooms in ordinary public schools.
- Accelerating the maintenance of existing school infrastructure to create a conducive teaching and learning environment.
- Provide ICT resources to schools, maintain existing hardware and reduce broadcasting to targeted schools to transform the traditional classroom and provide many opportunities.
- Conduct content workshops for all General Education and Training (GET) and Further Education and Training (FET) subjects.
- Conduct whole-school evaluation for under performing schools and develop and implement a whole-school intervention strategy.
- Implement a focus school strategy in line with economic segmentation in the province.

4.2.4 Basic education sector in South Africa

Educational reforms and curriculum transformation have been a priority in South Africa since the establishment of the government of national unity in 1994. Education is critical for redressing the injustices of the Apartheid colonialism that created an inequitable and fragmented education system in the country. TF has used this reform and transformation approach to address the needs of students from disadvantaged backgrounds. Factors such as school access, governance, curriculum, teacher deployment and financial resources have also gone through the education policy mill. While impressive progress has been made regarding legislative interventions, policy development, curriculum reform and the implementation of new ways of delivering education, many challenges remain. As Msila (2007) argued, education was used as a political tool to divide society and create a certain form of identity among learners during the Apartheid dispensation. Tabata (1997) made the point that Africans were subjected to what was known as 'native education' under the Bantu Education Act 47 of 1953 and the Extension of University Education Act 45 of 1959 during the Apartheid era. Therefore, post-Apartheid educational reforms and curriculum transformation are a direct response to the Apartheid curricula that have been described as authority driven and elitist (Jansen and Taylor, 2003).

According to section 29(1) of the Constitution, which provides the foundation of a post-Apartheid dispensation, 'Everyone has the right (a) to a basic education, including adult basic education; and (b) to further education, which the state, through reasonable measures, must make progressively available and accessible' (Republic of South Africa, 1996a). Furthermore, section 29(2) of the Constitution states that 'Everyone has the right to receive education in the official language or languages of their choice in public educational institutions where that education is reasonably practicable' (Republic of South Africa 1996a). The Constitution provides the foundation on which educational reforms and curriculum transformation in South Africa's education system are built. According to Burke (1995), the process of curriculum change started in response to growing concerns about, and dissatisfaction with, the curriculum at that time, creating a need for reform. Malan (2000) argued that the aim of education is to create teaching and learning environments that bring about desired changes in learners, whether to become more knowledgeable, better skilled or to influence their attitudes and values positively. The very essence of teaching and learning is to determine to what extent learners have acquired the intended competences (Malan, 2000). Attention should be paid to improving not only access to education but also to the quality of education. This is particularly important regarding teacher training, the curriculum and access to information for parents and learners (Gumede, 2013).

South African education has undergone several reforms to address the inequalities of the past. The first curriculum reform after the 1994 elections was the Nates 2005 curriculum. In September 1997,

an initial form of this curriculum was approved as three separate policy documents for the Foundation Phase (Grades R to 3), the Intermediate Phase (Grades 4 to 6) and the Senior Phase (Grades 7 to 9). The curriculum was revised during 2001 and released as the Revised National Curriculum Statement in 2002. Later, the Curriculum and Assessment Policy Statement was devised, not as a new curriculum, but as an amendment to the National Curriculum Statement. It was implemented in January 2012 and the National Curriculum Statement for Grades R to 12 was put in place nationally. A single comprehensive curriculum and assessment policy document was developed for each subject, replacing the subject statements, learning programme guidelines and subject assessment guidelines for Grades R to 12 that had been part of the former outcomes-based curriculum (Department of Basic Education [DOE], 2011).

One of the fundamental concerns is that the learning that takes place in schools is highly unequal with respect to the socio-economic status of children and the race group they belong to. Achievement gaps continue to be linked to socio-economic backgrounds, spatial location, whether a school is fee paying or non-fee paying and the province of residence. South Africa has high education enrolment rates each year and increasingly poor Grade 12 output rates. It is clear that more attention needs to be focused on the quality of education. It is, therefore, imperative that education programmes in South Africa are tailored to respond to both historical and perpetual challenges, as described in the literature. Only half of the learners who enrol in Grade 1 make it all the way through to Grade 12 (Modisaotsile, 2012). There are many reasons for poor learner outcomes, including weak institutional functioning; wasted teaching and learning time; ill-equipped school leadership; educators with poor content knowledge, pedagogical skills and accountability; and a lack of access to resources and educator support material, such as textbooks, workbooks, tools and methodologies. There is also little support from parents, SGBs and local communities.

Amnesty International's (2020) research shows that thousands of pupils and teachers have to learn and teach in schools that have inadequate infrastructure and lack essential facilities. In the government's statistics for 2018, of the 23 471 public schools in the country, 19% only had illegal pit latrines available for sanitation purposes, while an additional 37 schools had no sanitation facilities at all. Furthermore, 86% of the country's schools had no laboratory; 77% had no library; 72% had no internet access and 42% had no sports facilities, while 239 schools lacked electricity. Fifty-six per cent of South African HOD's reported that a lack of physical infrastructure hindered their school's capacity to provide quality infrastructure, while 70% of the HODs reported a shortage of library material. There are also large gaps in early learning, literacy, reading and numeracy levels that start to show as early as Grade 3 and which are significantly below international and African standards. In some provinces, more than 75% of children aged 9 cannot read for meaning, while in other provinces this is as high as 91% (Limpopo) and 85% (Eastern Cape). Of 100 learners who start school, 50 to 60 will make it to matric, 40 to 50 will pass matric, and only 14 will go on to

commence university education (Amnesty International, 2020). Based on these factors, it is clear that there is a pressing need to improve the quality and functionality of education in South Africa (Bloch, 2011). A good education system is crucial, not only to ensure that the learners are well educated, but also for human development and for the maintenance of a socially responsive economic and political system.

4.2.5 Importance of parental involvement in education

Emerging Voices (Human Sciences Research Council, 2005) defines parental involvement as 'a way of involving parents in the education of their children in order to make parents supportive of and informed about their children's progress in school'. Parental involvement is a term that is used to describe a wide variety of activities, ranging from occasional attendance at school functions and efforts to become better teachers of their own children, to intensive efforts to serve on an SGB and make decisions in the interest of their children's education (Dekker and Lemmer, 1993). Parental involvement plays an important role in learners' education, with numerous advantages for the learners. For example, parental involvement has a positive influence on the academic success of learners, motivating them not to give up easily when they do not understand a particular topic because they know that their parents are monitoring their school attendance (Ntekani, 2018). According to Garcia and Thornton (2014) and Ntekani (2018), research shows that the involvement of family in learning helps to improve learner performance, reduce absenteeism and restore parents' confidence in their children's education. Learners with parents or caregivers who are involved in their education, earn higher grades and test scores, have better social skills, and show improved behaviour than those whose parents or caregivers are not involved. According to Shaver and Walls (1998), learners whose parents are significantly involved in their education are better at reading and maths than those whose parents are not involved.

A study that was undertaken on the challenges of parental involvement in rural public schools in the Ngaka Modiri Molema district of North-West Province in South Africa (Matshne 2014) revealed that parents of children in black rural public schools do not involve themselves in school-related activities. The study identified illiteracy among the parents as one of the major factors that inhibit their meaningful involvement in schools. Research has also found that the socio-economic status of the parents is seen as the determinant of their level of involvement in the education of their children (Barbour *et al.,* 2008) and that a lack of honest, two-way communication between the school and families can also reduce parental involvement in schools.

4.2.6 Transition into primary schools

This transition period comes with mixed feelings in the learners as they must cope with changes and challenges, particularly when trying to adjust to a new grade, phase or school. Transition into primary school education involves proceeding from grade to grade, phase to phase, relocating from one school to another or moving from primary schooling to secondary schooling. Any of the listed transitions may create anxiety in learners (Ministry of Education, 2010).

Mkhwanazi (2017) identifies the transition between grades as challenging, particularly from Grade R to Grade 1, since formal schooling starts in Grade 1. The transition from Grade 3 to Grade 4 is also a challenging point of transition because it involves moving from one education phase to another. Grade 3 is the exit grade for the Foundation Phase, while Grade 4 is the entry grade for the Intermediate Phase (Department of Basic Education [DBE], 2011). Moreover, this transition point is noted for a substantial increase in the workload, owing to the number of extra subjects offered in Grade 4 (Mkhwanazi, 2017). Thus, the transition between Grades 3 and 4 requires special consideration, as these grades form the foundation for the entire structure of formal education.

Teachers, especially in schools located in rural areas, face serious challenges when preparing the 21st century learners for the next grade. They lack proper training in the new teaching strategies involved in 21st century classrooms (Keiler, 2018). Adding to this confusion, a major disruption to the teaching and learning process was caused by the outbreak of Covid-19 in the country, which led to the complete shutdown of schools in March 2020. This greatly contributed to the challenges experienced by the teachers dealing with transitioning learners. Teachers had no option but to use virtual, online teaching or home schooling. The teachers were obliged to use Fourth Industrial Revolution (4IR) skills for which they were not prepared. The most negatively affected learners were those in the rural areas, because of socio-economic factors and lack of internet connectivity. The learners had to use radios, telephones and televisions to access information, devices that are not necessarily available in their homes (Miks and Mcilwane, 2020). In this case, it became challenging for teachers to deal with the new incoming learners in their classes.

A child does not develop in isolation, but through interaction with other people in their environment (Gredler and Shields, 2008). The following factors need to be considered during the transition period in primary school. Through interactions with peers in a classroom that provides learners with active learning opportunities, the child becomes part of the classroom culture, as they seek the cooperation of others when engaging in activities and when reflecting on their actions by asking questions; when communicating predictions; when clarifying thought processes; and when reaching conclusions (Gredler and Shields, 2008). When teachers support learners to communicate and share ideas, the classroom should be an inviting space that encourages dialogue.

Seating should be arranged in such a way that learners face each other for ease of communication, as well as to encourage interaction with the teacher (UNESCO, 2006).

4.2.7 Literacy and numeracy

Preschool literacy teaching in ECD education, inclusive classrooms, is crucial to prepare learners for the transition to formal literacy teaching and learning. According to Nkomo (2021), research shows the first eight years of life are the most important in terms of human development. Learning at this stage is influenced by a friendly and safe environment, this is the time when learners' social, emotional and cognitive skills develop. The teachers' influence on their learners at this early learning stage is immense when the learners continue to expand their skills as they progress through each grade. This development and growth will influence how learners will view education throughout their life. Without these foundational skills, learners will face challenges later in life. While in the Foundation Phase, learners start to grasp challenging concepts, and their teachers can identify and address any learning concerns. Addressing early learning can prevent a gap from developing in learning that may result in future learning problems. A quality foundation education can help learners thrive and unlock their full potential. The Foundation Phase is the phase during which learners learn and develop valuable life skills that will help them in the real world.

In South Africa, the use of the language of learning and teaching (LoLT) in multilingual societies is a very important issue to consider. The use of the home language as the LoLT, while also providing an additional language in the early years, is pivotal because it is in line with the Education for All (EFA) campaign goals (DOE, 2008). The South African education system uses home language for education in the first three grades (including Grade R) in primary schools, which is then followed by English medium education for the approximately 80% of speakers of African languages (Heugh, 2013). The country's language in education policy (LiEP) stipulates that 'all learners shall be offered their LoLT and at least one additional approved language as a subject'. The selection of LoLT at a school mainly depends on the choice made by the learners and their parents (DBE, 2010).

White Paper 6: Special Needs Education, Building an Inclusive Education and Training System (DBE, 2001) refers to the language of learning and teaching. which create barriers to learning. The implication is that there is a need for schools to serve a wider school population and, subsequently, to provide support for English (Nel, 2011). Teachers, in general, are compelled to teach basic levels of English in order for learners to survive in their schools and in society. Often teachers are not equipped with the skills to meet the diverse needs of these learners and the teachers, themselves, may be teaching in English as their second or third language (Nel, 2011), while learners may lack the ability to read properly in their home language and lack an understanding of English, the language in which they will be taught from Grade 4 onwards. In Grade 4, learners are expected to

transition, not only from the use of their home language to English as the LoLT, but also from learning to read, to reading to learn (Spaull *et al.,* 2015). A study undertaken in March 2018 found that South African teachers could not pass simple mathematics and English tests, with some scores as low as 10% for English first additional language and 5% for mathematics. Another study undertaken by Stellenbosch University found out that Grade 4 to 7 (Intersen Phase) mathematics teachers in under resourced schools in the Eastern Cape were not proficient in English, the language they are supposed to teach in, and that they also lacked a knowledge of mathematics (Amnesty International, 2020).

Nel (2011) expressed concern about early learning and literacy in South Africa as many African language-speaking parents are inclined to enrol their children in schools where the LoLT is English, rather than an African language. However, the reality is that in most rural and township schools, approximately 65% schools use an African language as the LoLT, while urban schools, which have English as their LoLT, constitute less than 20% of schools in South Africa. This means that learners in these schools need to learn English and, at the same time, learn the curriculum content in English, which is their second or third language (DBE, 2010). Grade 4 is a crucial year in the South African schooling system. Up to Grade 3, the majority of learners receive fundamental teaching in their mother tongue, with one educator offering all four subjects. Grade 4 encompasses the transition to the Intermediate Phase (Grades 4 to 7) where subject teaching is introduced, with different teachers teaching each of the six subjects offered. This transition poses several challenges to learners, to which they must adapt. Having to change the LoLT seems to be the most challenging aspect of this transition.

In the Progress in International Reading Literacy Study (PIRLS) of 2016, South Africa was ranked as the lowest performing country out of 50 countries. Around 78% of South African Grade 4 learners do not reach international benchmarks and, therefore, do not have basic reading skills by the end of the Grade 4 school year. Learners living in remote rural areas, small towns or villages and townships demonstrated the lowest reading literacy achievement (Combrinck *et al.,* 2016). The PIRLS of 2016 and the Trends in International Mathematics and Science Study (TIMSS) of 2019 provided internationally respected measures of learning trends over time. These studies indicated that large numbers of South African children reach Grade 4 without having learned to read for meaning and Grade 5 without achieving basic numeracy proficiency. These outcomes at Grades 4 and 5 are a reflection of the education quality challenges that persist in the Foundation and Intermediate phases.

It is encouraging to note that the DBE has made an effort to put the National Strategy for Reading in place. As part of the development of this strategy, South Africa joined the UNESCO Literacy Decade 2003–2013 and the EFA campaign in order to increase the literacy rates in the country by

50% by 2015 (DBE, 2008). In addition, the Read to Lead campaign was officially launched in 2015 with a focus of improving the reading abilities of all South African children, while the primary aim of the campaign is to ensure that all learners are able to demonstrate age-appropriate levels of reading by 2019. In 2019 the National Reading Coalition (NRC) was established by the National Education Collaboration Trust (NECT) and the DBE as a comprehensive national response to the reading challenges facing South Africa. The NRC is a coordinating structure where all reading initiatives and interested stakeholders can come together to share knowledge and successful learning experiences. Despite an effort to promote literacy, South Africa is contending with numerous challenges relating to infrastructure, such as no running water, electricity and sanitation; old buildings; huge teacher/learner ratios and under qualified teachers; lack of nutrition; and a lack of institutional capacity and funding (Atmore, 2013).

A study by O'Carroll (2011) on early literacy development in two disadvantaged communities in Cape Town revealed that almost half of learners who entered Grade 1 were not able to recognise any letters. However, by means of an intervention programme in Grade R, the learners were able to learn letter-sounds while learning language skills, emergent writing and print concepts. This points to a lack of an emphasis in the Grade R curriculum on early literacy development and calls for the introduction of quality Grade R teacher training programmes with an emphasis on emergent literacy. In the Social Franchising for ECD Literature Review of 2014, Murris (2014) expresses concerns about the little emphasis placed on reading for meaning, thinking skills needed to make sense of complex texts and how to teach it in the Foundation Phase in South African schools.

To be a successful reader requires of learners to be able to link meaning to specific words, which is necessary to develop analytical skills. Environmental, school and biological factors all influence reading literacy development (Zuze and Reddy, 2013). Literacy knowledge and skills lay the foundation for reading and writing (early literacy) in all academic tasks. During early literacy acquisition, learners can explore the world through books, story-telling and other reading and writing activities. The learner can learn about enjoyable topics and acquire knowledge and concepts in order to experience success in school and elsewhere. Through literacy knowledge and skills, bilingual learners can demonstrate their abilities, skills and languages in a second language as well as their home language (US Department of Education, 2010).

Knowledge about the development of early numeracy skills and their relevance for later mathematics learning has been increasing rapidly over last 10 years (Aunio and Rasanen 2015; Fritz, Ehlert and Balzer 2013; Krajewski and Schneider 2009). In general, authors agree that numeracy performance in the early childhood years adequately predicts later mathematics performance (Jordan, Glutting and Ramineni 2010). Unfortunately, many children in various parts the world do not have sufficient opportunities to learn and practice early numeracy skills. In South

Africa, it is evident from large-scale assessments that children are performing far below the expected grade levels in the first years of primary school (Spaull and Kotze 2015). Venkat and Spaull (2015) argued that one of the problems in this regard is that the mathematics knowledge of teachers may be one of the reasons why the learners do not develop competence. Consequently, teachers may have difficulty knowing what the most important maths skills for children are and how to adapt their teaching to address these skills. There are various known causes for the performance of learners in the early grades in mathematics, such as differences in cognitive functions or inadequate opportunities for learning essential mathematical skills. A set of longitudinal studies targeting the developmental trajectories of the numeracy skills of early learners revealed that learners who enter Grade R with low performance in numeracy skills remain behind their peers throughout all their school years (Aunola *et al*., 2004; Jordan *et al*., 2006; Morgan, Farkas and Wu 2009). Low performance in early numeracy skills learning can be seen, for instance, in poor and slowly developing counting and numerical relational skills (Aunio and Niemivirta, 2010).

The findings of studies conducted in 2005 and again in 2013 by the Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ, 2014) indicated that, out of the more than 1 000 South African male and female sixth graders who participated in the standardised mathematics test, 80% did not demonstrate acquisition of the mathematical skills and competencies expected of learners of their age and grade placement (Rademeyer, 2014). A national study found that 58,6% of the Grade 6 learners who took part in the research were not functionally numerate (Spaull and Taylor, 2012). A TIMSS targeting the Grade 5 level was conducted in South Africa for the first time in 2015, after which the country became part of the TIMSS 2019 cycle. This study provided an opportunity for South Africa to, firstly, determine its achievement in relation to other countries and, secondly, to establish a trend in mathematics performance. According to the TIMSS 2019 international results in mathematics and science, a total of 64 countries and entities took part in the TIMSS 2019 Grade 4/5 study. The five worst performing countries were Morocco, Kuwait, South Africa, Pakistan and the Philippines. According to the TIMSS 2019 mathematics and science achievement outcomes, 37% of learners in South Africa demonstrated that they had acquired basic mathematical knowledge, while 28% demonstrated that they acquired basic science knowledge.

4.2.8 Literacy and numeracy programmes in South Africa

Different literacy and numeracy programmes are trying to address the systemic challenges of literacy and numeracy in South Africa. There are programmes that focus on improving the quality of education in order to address literacy and numeracy by focusing on improving teacher development through training and by improving teaching skills. Other programmes focus on providing and improving the resources that are made available to learners to create a conducive

learning environment for learning by promoting reading and material development and establishing libraries for reading and learning. The organisations noted below are a select sample of the hundreds of maths and literacy interventions happening across the country.

The RET operates broadly in the education and literacy sectors, specifically in educator training and the provision of school resources. The RET's language programme includes the training of teachers in the use of effective methodologies to enhance teaching. RET uses a blended approach that includes group training, school-based workshops, classroom visits and reflection by all stakeholders in order to obtain results. This active differentiation according to the needs of the teacher means that a trainer will be able to draw on a vast resource bank to support the teacher.

Literacy skills are a strong predictor of future academic success in all subjects and learners who regularly read and hear engaging stories in languages they understand, are well equipped and motivated to learn to read and write. Nal'ibali has a well-established culture of reading that is attempting to address the systemic literacy challenges faced by the education sector in South Africa. Nal'ibali uses the power of language and cultural relevance in literacy development by promoting reading and writing in mother tongue languages, ensuring that all children and adults understand what they are listening to or reading for it to be meaningful and enjoyable.

Similarly, Room to Read South Africa offers a comprehensive literacy programme that combines home-language classroom instruction with well-functioning libraries. Seventy-seven per cent of schools in South Africa have no library (Amnesty International, 2020). Inadequate school conditions, mixed with scarce teaching materials, limit learning opportunities for learners, especially in rural and densely populated urban areas. Room to Read's literacy programme ensures that primary schools have libraries filled with books in the learner's local languages, as well as teachers and librarians who are trained how to engage a classroom of young learners.

MCIS provides mathematics, science and technology technical training and support to enhance outstanding teacher performance and disadvantages in school learners from Grade R to Grade 12. MCIS uses the cumulative gaps correction model to empower teachers to know, understand and deliver the entire curriculum. The model assists learners to catch up and ensures that they can understand and master maths in the current grade that they are in. The purpose of this initiative is to ensure that learners develop an extensive understanding of mathematics

The Centre for the Advancement of Science and Mathematics (CASME) focuses on ensuring effective change in the approach to the classroom teaching of science and mathematics by empowering educators to assume responsibility for their own professional development. This is done by providing in-class support and development to ensure that teachers teach effectively,

understand learner needs, plan for assessments, love teaching and have a positive attitude towards their teaching.

Ukuqonda Institute's materials are strongly focused on learning with conceptual understanding and the development of key concepts, rather than simply preparing learners for tests and examinations by providing them resource material. The institute's learning materials assist learners to become engaged in meaningful tasks and activities, which provides them with opportunities to make sense of subject content and provides space for them to engage in their own thinking. Ukuqonda actively pursues ways to develop responsibility for own learning and build self-reliance by insisting on and allowing space for learners to take initiative

It is worth noting that there is no one model that is better than the other because they each play a critical role in different aspects in addressing some of the systemic challenges within the broader LitNum landscape. There are no costs attached to the description given above and further permission is required from the mentioned programmes to get financial data. There is a need to engage these organisations to get permissions on their actual financial spend before we publicly document this.

4.3 Dr Enos Mabuza Scholarship Fund programme

This section discusses the DEMSF programme. It does so by reviewing relevant literature about the tertiary education sector. The purpose of this section is to provide context about challenges and the impact thereof in relation to access, support and the transition journey into the world of work.

Much of the published evaluation information was obtained from regional and international studies, mostly from Africa, the USA, Latin America and Asia. The recently published evaluation of the National Student Financial Aid Scheme (NSFAS) was useful for highlighting the challenges encountered in the government's bursary disbursement programme. Earlier this year, Minister Nzimande reiterated the inability of the government to afford to support a 0% fee increment and, despite universities eventually waiving registration fees and making fee arrangements for students at the start of 2021 academic year, the funding crisis remains. In February 2021, Minister Nzimande announced that NSFAS had received an unprecedented number of applications compared to previous years, with approximately 730 000 online applications received and approximately 60 000 more applications received through the National Youth Development Agency (NYDA) and the TVET college walk-in processes. NSFAS' latest 2021 Funding Status Report shows that, as of June 2021, a total of 623 386 students (382 982 being new applicants) were funded in the current academic year. This comes after a government budget allocation cut of R9 billion.

The few published studies based on South African tertiary education sector helped shape the design and analysis of some of the findings. Most South African students cannot afford the cost of higher education, with 70% of them entering university being first-generation university participants who come from poor backgrounds with few financial resources (Universities South Africa [USAf] nd; Strydom, 2019). Financial and socio-economic factors have been widely reported as the most crucial factors influencing student access higher education across South African HEIs.

4.3.1 Tertiary education funding crisis

Student debt in South Africa has continually increased and now sits at almost R14 billion, with historically disadvantaged institutions bearing the brunt of the burden. The funding crisis has become even more prominent in the past six years, as evidenced by the recurring protests about the consequences of a financially weak higher education system (e.g., #FeesMustFall movement in 2015 and the #Asinamali protests in early 2021).

The gap between statutory funding (NSFAS and DHET) and actual funding requirements should be planned for in a strategic way, where contributors bring to the table what they are best at and align strategies from that point on. It is estimated that it would cost R121 billion per annum (Gqubule, 2021) to provide free tertiary education. The concern over free education and student debt in South Africa occurs within a global context in which higher education institutions the world over struggle with questions about funding models, debt and sustainability. The situation is exacerbated by the economic consequences of the ongoing Covid-19 pandemic. In Zimbabwe, students expressed shock after they were informed of tuition increases of up to 450%, following an undertaking in January 2021 by the government that it would block hikes until the Covid-19 pandemic had subsided. According to Forbes, student debt in the USA has reached US$1.56 trillion because of political interference, economic recession and the Covid-19 pandemic, among other factors. Student debt is the second largest consumer debt category in the US. In Asia, a red flag has long been flown over student debt, and in Latin America, the student protest campaign #MatrículaCero in Colombia, Chile, Ecuador and Peru has highlighted a near-universal challenge with higher education funding as a result of economic difficulties that have prevailed because of the Covid-19 pandemic, limited use of university facilities and the decline in curriculum quality (Naidu, 2021).

4.3.2 First-generation students and graduates

Levels of parental education serve as the most important proxy for socio-economic background because of its influence over whether their children finish secondary school, gain access to tertiary education and succeed (Ball, 2020). Achievement scores in Grade 12 mathematics and physical science are critical factors in determining whether young people can access higher education.

These scores also determine whether young people can enrol for subjects in the science, technology, engineering and mathematics (STEM) professional fields, such medicine and engineering which require high scores in these subjects (Council on Higher Education [CHE], 2013).

Seventy per cent of the students who enter university are first-generation university participants (Bawa and Strydom, 2019). These students are more vulnerable to financial pressure and less sure about where their next meal might come from. Both access and success remain racially skewed. In comparison with other racial groups, more black students are able to access university, however, their participation in the proportion to age cohort is still amongst the lowest (18% vs 56% white student participation per age cohort) (CHE, 2019).

Most students, even with NSFAS support, face financial pressures, especially first-generation participants and black students. Financial stress remains a major driver of dropout rates.

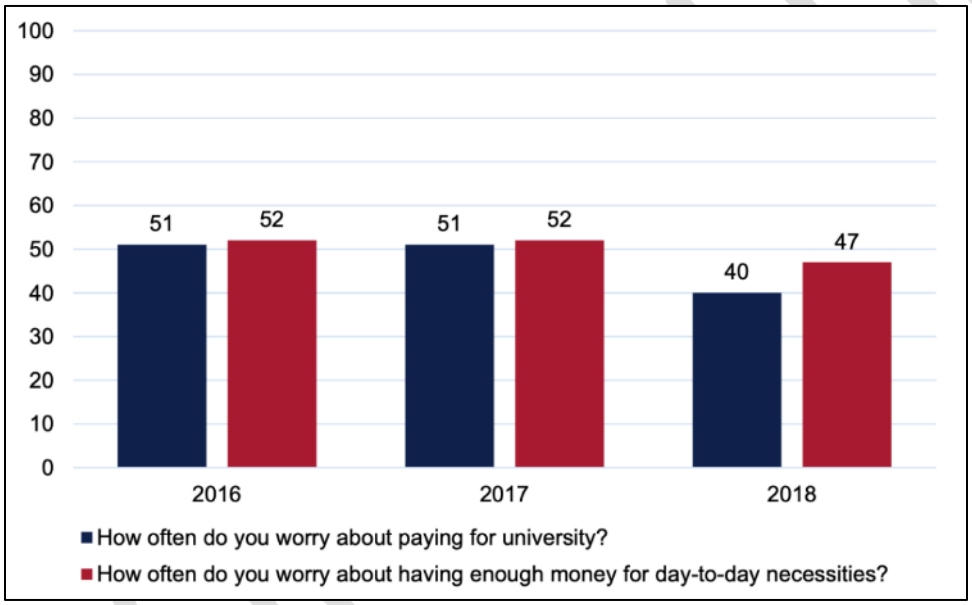


Figure 5: Financial stress (Source: Bawa and Strydom, 2019)

As indicated in Figure 5 above, a study conducted by Bawa and Strydom (2019) across 12 universities indicated that, out of 120 students surveyed, most faced significant stress as a result of a combination of worrying about paying for their tuition fees, where they would get their next meal from and how they would pay for study material and other living expenses.

The beneficiaries sometimes choose bursaries based on the financial pressures at home, which is more common among first-generation students. For example, students may choose a particular bursary because they would get a monthly stipend in cash, instead of quarterly vouchers. Sometimes beneficiaries are under immense pressure to send the little money allocated for

allowances and meals home to help provide for the financial needs of their families, which compromises their own academic success because they have to study with no food. For some this might mean having to borrow or photocopy books, going without the necessary tools as a result, in order to be the breadwinner of the family (USAf, 2019).

The social context surrounding our students shows that 70% of the students who enter higher education do not have parents who graduated from university, 45% of students who enter higher education have no family members who graduated university and 79% of first-generation students are black African, while all other population groups are below 10% (USAf, 2018).

4.3.3 Setting students up for success

Success remains strongly correlated with race; rates are higher for black and coloured students when it comes to dropouts and lower when it comes to graduation and success (Broekhuizen *et al.*, 2016). Achievement gaps illustrated in the figure below.

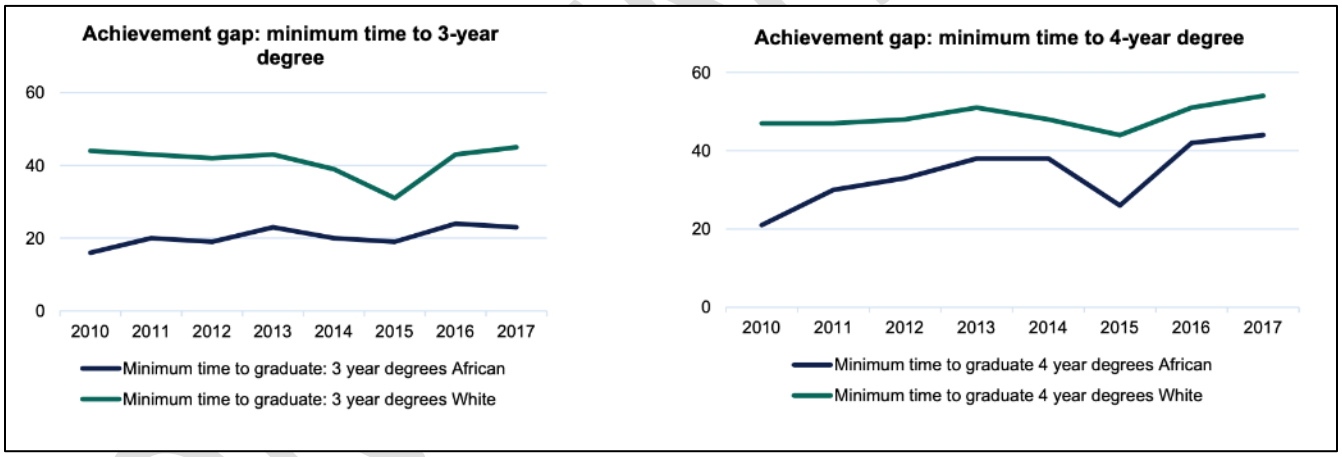


Figure 6: Achievement gap – African and white students

Underlying this achievement gap is the disparity between the learning requirements of higher education programmes, on the one hand, and the knowledge and competencies of students entering universities that is caused by the differences in teaching and learning between high school and tertiary education, on the other (Lewin and Mawoyo, 2014). Return on investment in higher education is greater in sub-Saharan Africa than in other economies, 21% in sub-Saharan Africa, 17.3% in South Asia, 15.9% in Latin America and 14.8% in East Asia, with a 14.6% return in all economies and 11.1% high-income country economies (DHET, 2015). This is an indication of the achievement gap, where you have students completing their degrees on time, i.e., 3-year degree completed in 3 years or enrolling students in extended programmes so they complete in 3 + 1

(n^2+1), knowing they would otherwise have failed if they tried to complete in three years rather than passing on an extended programme.

The Covid-19 pandemic presented many challenges to students, as most students had to study remotely. As a result, students lacked access to technology. In addition, the youth unemployment rate and mental health cases are on the rise. Thirty-three per cent (3.4m out of 10.2m) of youth between 15 and 24 years of age are not in employment, education or training (NEET). The youth unemployment rate in South Africa increased to 64.4% in the second quarter of 2021 (QLFS, Q2:2022), to the highest level it has ever been at. Graduate unemployment sits at 11%, while unemployment among people with other tertiary qualifications is at 24%. Statistics from 2019 show that 12% of South African university students experienced moderate to severe symptoms of depression, 15% had moderate to severe symptoms of anxiety and 24% report suicidal tendencies. In recent years, increasing rates of student suicides in South African universities has increased the urgency for developing coherent institutional and sectoral strategies to address student mental health needs. The impact of the Covid-19 pandemic has increased the prevalence of mental health issues and the need for appropriate financial, mental health and psychosocial support for students. A 2003 study by Groenewald and Schurink pioneered the notion that, if holistic funding with relevant support interventions were properly implemented, they would lead to access to education, improved completion rates, development of work ethics, ambition to succeed, access to employment and desire to contribute to society. First-time entry into the labour market and securing the first full-time, formal sector job is considered the most important life-course transition for a young graduate from higher education into work. Failure to access their first job has the power to condemn young people to permanent unemployment. Early success in securing the first job shapes the future trajectory up the occupational ladder. Interventions to support young people make this transition successfully are crucial, including career guidance offered by universities and other higher education stakeholders.

The challenge of providing comprehensive student support is far greater than any single partner can overcome alone. Many of the important barriers to success relate to multiple socio-economic factors. The National Plan for Post-School Education and Training (PSET) is government's response to address youth unemployment and socio-economic growth: 'By 2030 we aim to have developed a more socially just, responsive, and well-coordinated PSET system, providing access to a diversity of quality education and training opportunities, where students have a reasonable opportunity for achieving success, and with vastly improved links between education and the world of work.' (Dr Diane Parker, DHET, 2019).

[2] North Star Metric measuring progress.

5. Literacy and Numeracy programme evaluation findings

This section discusses the evaluation of findings from the data collected from Lit Num programme. The findings are discussed with a specific focus on the impact of the programme, its relevance to TF and DBE's strategies, effectiveness, efficiency and sustainability. Each evaluation question is answered as per the terms of reference, evaluation scope and objectives.

The quantitative findings provide statistics of reach data, amount spent in rands, as well as sociodemographic characteristics of the beneficiaries, where possible. In addition, in order to measure the extent to which impact was realised, quantitative data pertaining to learner performance is analysed and presented.

The qualitative data provide findings on the extent to which impact was achieved, the experiences of the end beneficiaries of the programme, challenges that were experienced and what the respondents recommended about what can be done to improve the programme. The qualitative findings are an overview of the themes that emerged out of the FGDs conducted with MCIS, RET, subject advisers, teachers, school principals, learners and key stakeholders from TF. Qualitative data allowed for an understanding of the impact the Lit Num programme had on project beneficiaries.

The structure of the explanation follows the reporting of themes, a description relating to the theme, as well as supporting quotes from participants.

5.1 Overview of activities

5.1.1 Maths Centre Incorporating Sciences

Table 14: Workshop activities undertaken

	2019	2018	2017
Total number of workshops received by each teacher	12	12	8
Total number of support hours received by each teacher	22	15	16

The total number of workshops conducted for teachers each year is indicated in Table 15. In 2017, eight workshops were held. The number of workshops was increased to 12 in 2018 and 2019. The total hours received per each workshop was 16 in 2017, 15 in 2018 and 22 in 2019.

Table 15: Nkangala: Classroom support visits undertaken during reporting period (planned v actual)

	2019		2018		2017	
	Planned	**Actual**	**Planned**	**Actual**	**Planned**	**Actual**
Observations	35	29	35	31	7	7
Demonstration	35	24	35	30	14	7
Co-teaching	70	66	70	67	69	20
Total	140	119	140	128	90	44

Reasons for variation:

- In 2017, the focus was mostly on the teachers who had never received any form of support from the project, especially newly appointed teachers fresh from college. It is worth noting while a larger number of teachers were planned, the programme only targeted teachers that had not received any form of support.
- In 2018, the actual observation visits were fewer since most teachers in the phase were teaching different grades. The targets in 2018 and 2019 were not met as planned.

Table 16: Gert Sibande: Classroom support visits undertaken during reporting period (planned v actual)

	2019		2018		2017	
	Planned	**Actual**	**Planned**	**Actual**	**Planned**	**Actual**
Observations	35	35	35	30	9	9
Demonstration	35	35	35	45	18	18
Co-teaching	70	70	70	70	63	63
Total	140	140	140	145	90	90

Reasons for variation:

- In 2018, the actual observation visits were fewer since most teachers in the phase were teaching different grades, so demonstrations had to increase rather than ensuring substantial exhibition to all teachers.

5.1.2 Read Educational Trust

RET only provided details of the number of interventions for 2019. No details on the planned versus actual activities were provided in their reports. In future programmes, it is important that this information is provided in order to measure the extent to which objectives are met.

Table 17: Professional development hours per teacher Jan to Dec 2019

Teacher contact: training	
Grade R	18 hours of training in total
Foundation Phase	15 hours of training in total
Intermediary Phase	27 hours of training in total
Management training	12 hours of training in total
Per teacher contact session	
Grade R	6 training sessions
Foundation Phase	5 training sessions
Intermediary Phase	9 training sessions
Management training	4 training sessions
Classroom support visits	
Grade R	156 visits
Foundation Phase	69 visits
Intermediary Phase	327 visits

In this section, the approaches that were used to implement the Lit Num programme are discussed, namely the teacher-focused approach; creation of a conducive learning environment; training HODs to enable systemic and sustainable impact; providing resources such as books, wall charts, practical learning aids for mathematical measurement; continued support from the RET and the MCIS, and convening regular meetings of the steering committee to identify implementation challenges and proactively solve them.

The teacher training and development approach was used to ensure that teachers were well equipped with the relevant teaching methods and were able to create a conducive learning environment, where resources are used for interactive teaching and learning to improve learning outcomes in numeracy and literacy.

The reading materials were used to create reading and numeracy corners. The reading corners make use of grade-appropriate books, which are used to support continuous classroom learning. The objective of the reading corners was to assist in instances where learners could not go to the library. Other learning resources included learning boxes, wall posters and literacy and numeracy charts. These resources were used to support the new methods of learning used, such as shared reading, guided reading and encouragement of daily reading.

MCIS school-based teacher workshops, classroom support visits and block training using endorsed and non-endorsed South African Council for Educators (SACE) manuals were planned and conducted to help teachers to improve on the content and methodology gaps that were observed throughout the project cycle. Curriculum and content development and understanding were addressed in these sessions. Teamwork was efficiently managed and lesson planning suitable for different learner abilities and needs was developed using the CAPS policy document as the main point of reference for all pedagogical interventions. Additionally, lesson presentations focused on emphasising the integration of 4IR technologies, gamification and appropriate resource material usage into teaching and learning.

RET trained teachers to implement a balanced language programme for language teaching in classrooms. This was done by providing in-service education and training to educators. The programme was book-based and used methodologies contained in CAPS. On-site classroom support was tailored to each teacher's needs. CAPS was incorporated into RET's material and was fundamental to the training and teacher support visits conducted by the trainers. Monitoring and classroom support were conducted as a follow-up to every course to promote sustainability. RET worked in the schools daily. Mentoring and assessment systems ensured that teachers could apply the methodologies correctly and achieve the outcomes specified in CAPS.

5.2 Impact

5.2.1 What is the impact of the programme on end beneficiaries?

This section discusses the overall impact of the programme. The approach used in this section is to give a detailed account of how the impact was attained, and what elements of the programme demonstrated the extent to which impact was attained. Overall, it can be seen from the evaluation that impact in the funded Lit Num school was substantial. This is mainly because there was an

observable improvement in learner performance owing to the training of the teachers, improved learner confidence, effective use of resources that were made available by TF in the classrooms and outside, improved pedagogical skills and improved parental involvement.

A cumulative number of 85 709 students have been supported through the Lit Num programme, with a total of just over R18 million spent since programme inception in 2013, until 2019 when the programme ended. Importantly, given the cumulative nature of this figure, it is not 85 709 unique learners that have been reached. The table below provides a breakdown of the number of learners who were reached.

Table 18: Number of districts, schools, learners, teachers and total spend

Year	2013	2014	2015	2016	2017	2018*	2019	Total
Number of schools	12	16	16	16	16	62	16	16
Number of learners	3 142	8 814	1 2547	1 605	12 547	30 000	17 054	85 709
Number of teachers	72	196	283	30	232	720	306	1 839
Amount spent	R255 166	R2 384 705	R2 664 915	R962 090	R2 772 086	R5 111 589	R4 716 615	R18 001 366
Number of districts	2	2	2	2	2	2	2	2

***** In 2018, funding was increased in order to extend programme reach by providing training workshops to HODs in 46 additional schools: reaching over 720 HODs and 3 000 teachers across Nkangala and Gert Sibande. These additional schools were not part of the sample of 16 schools that was analysed as part of this evaluation.

The table above shows the number of schools, learners and teachers supported by the programme in two districts since its inception in 2013. Over the years, TF has increased its spending on the programme and, subsequently, increased the number of teachers and learners who benefitted as the programme was expanded in the schools from the Foundation Phase up to the Intermediate Phase. In 2016, TF could not provide funding for MCIS and RET to get into the schools because they did not have the necessary budget. However, funding (R962 090) was sourced from Shell South Africa.

5.2.1.1 Improved learner performance

Improved learner performance was observed post-implementation. According to the evaluation respondents, reading fluency improved because of the various reading activities implemented at school level. In terms of literacy, learners were able to self-regulate in the classroom and were able to read with meaning.

> *The was an improvement in learner performance from the learners in Grade 3 from when the programme started, and three years thereafter there was an improvement in the results from learners in Grade 6, particularly in isiZulu and Mathematics.* ***School Principal***

> *Learners are now able to read, and winning trophies and certificates during school competitions. Two trophies have been won by the school so far.* ***School Principal***

This was augmented by the site visits where learners were observed demonstrating their ability to communicate effectively and articulate themselves clearly and with confidence, while attributing their development to the resources provided by the programme. Quantitative data obtained from the MCIS and RET further provide details of the extent of performance improvements (as discussed below).

According to the respondents interviewed, learners used the resources available to them in their reading clubs, and there was an improvement on phonic knowledge, which allowed learners to decode text easily. From reading reluctantly in class, learners were reading for enjoyment, signalling a shift in both behaviour and understanding. This led to improved fluency and comprehension across different genres and texts, as well as improved writing skills, time management and an understanding of the writing process.

> *Learners have confidence and better performance in reading and writing competitions. The result of the programme is now seen in those learners in intermediate/senior phase.* ***School Principal***

Read increases reading for fun through reading clubs, it translates to reading with understanding. The diagnostic report for 2020 you will see that one of the key things that learners fail is because they cannot read with understanding. and from Read if you increase the reading it will improve the understanding. The workshops helped us improve to get learners to read for understanding. ***Subject Adviser***

With regards to numeracy, a result of teacher training and classroom support visits, learners came to realise that maths is a language on its own and learners had fun, while simultaneously improving their mathematical understanding.

Findings from the interviews with HODs, principals and teachers on the positive results of the numeracy programme indicate that learners now enjoy reading and can read with understanding, learners are confident in public speaking, are able to communicate fluently and even learn on their own at home.

The section below details learner performance monitoring data. This data was sourced from reports submitted to TF by MCIS and RET. Pre- and post-assessments were conducted at schools by the funded partners. Data was then analysed and averaged per primary school. Baseline and end-line data is presented to show learner performance changes. Baseline data was collected in the beginning of the term, before implementation, while end-line data was collected post-implementation, at the end of the year.

For the purposes of showing how learner performance improved over the course of the programme, 2017, 2018 and 2019 data is presented.

5.2.2 Grade R literacy and numeracy performance

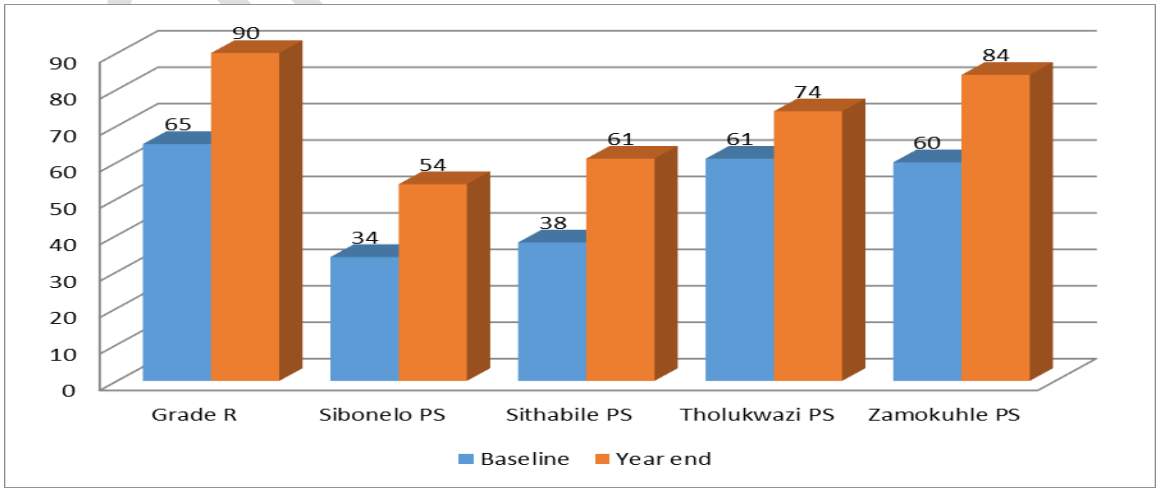


Figure 7: 2017 Grade R literacy learner performance

Overall, there was a positive trend showing an increase in performance as indicated in Figure 7. Learner performance at baseline was lower than at end-line, which demonstrates the outcomes of the programme. The Grade R schools that were tested showed satisfactory performance at baseline, achieving an average result of 65%, indicating good preschool learning skills. This improved to 90% at year-end, indicating that the group, by and large, attained the necessary skills to enter formal schooling. Zamokuhle Primary School was the best performing school, with 60% of their learners passing at baseline and moving to 84% at end-line.

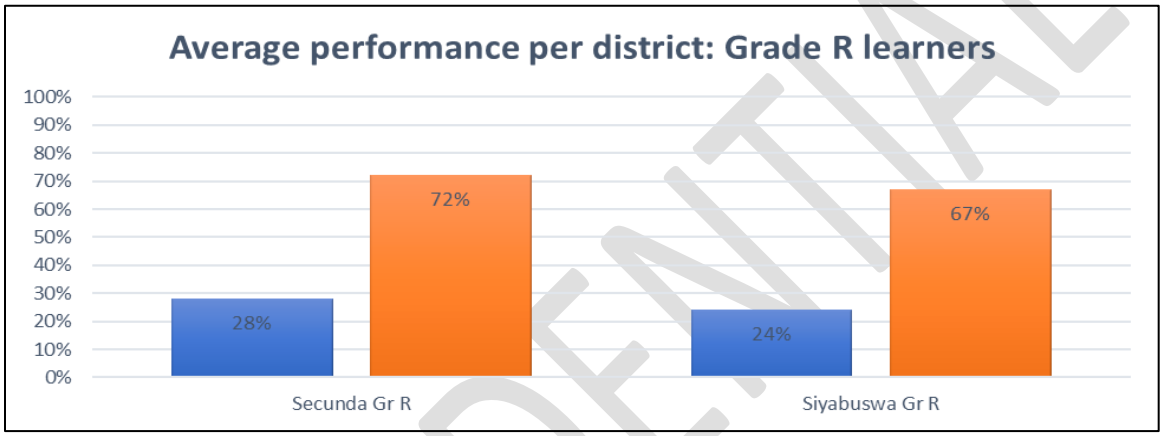


Figure 8: 2018 Grade R literacy learner performance in Secunda and Siyabuswa

Figure 8 shows literacy improvements in programme schools in Siyabuswa and Secunda. In 2018, there was improvement from baseline in learner literacy. Grade R learners from Secunda improved by 44 percentage points from the beginning of the year. Grade R learners from Siyabuswa improved by 43 percentage points from baseline. The Grade R learners were able to improve their performance significantly, which speaks to the outcomes of TF's programmes.

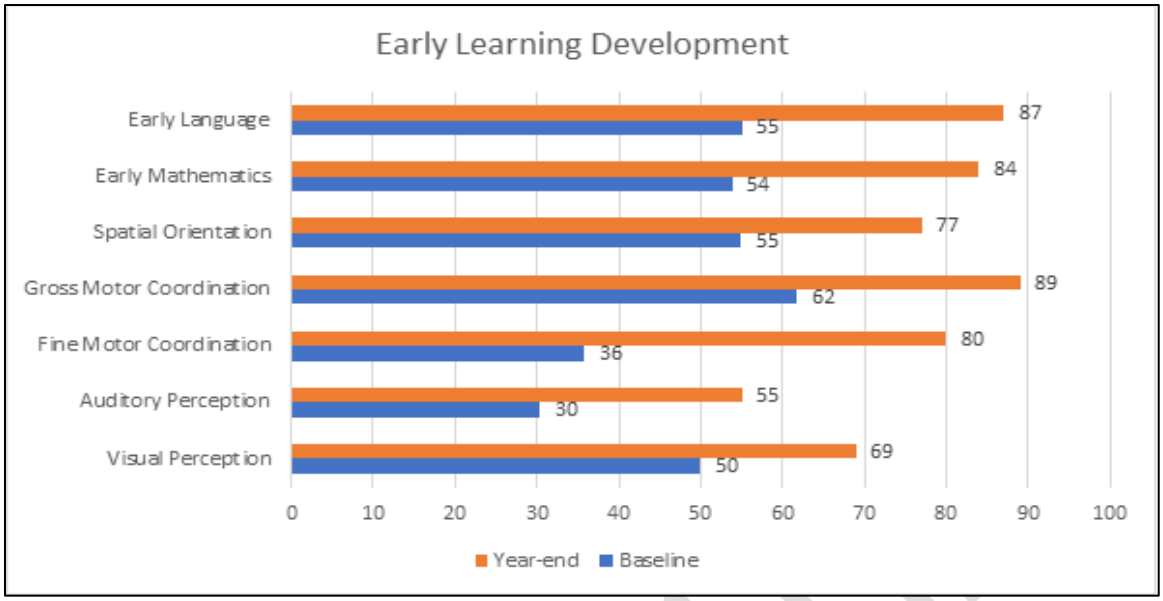


Figure 9: 2019 Grade R literacy learner performance for both districts

In 2019, pre- and posts-test results for early learning development showed a substantial increase from baseline to end-line. Learner performance in the early learning test improved significantly as a result of a year of instruction. Auditory perception and visual perception skills are the skills where the learners performed the lowest, indicating that a large number of learners need to further develop these skills to make a successful transition to formal learning in the Foundation Phase.

Figure 10 shows comparisons of six mathematical concepts among learners from nine of the funded schools from 2017 to 2019. The results indicate that each year new cohort of learners performed better than the previous year. This speaks to the fact that continuous training and support given to the teachers assisted in increasing learner performance.

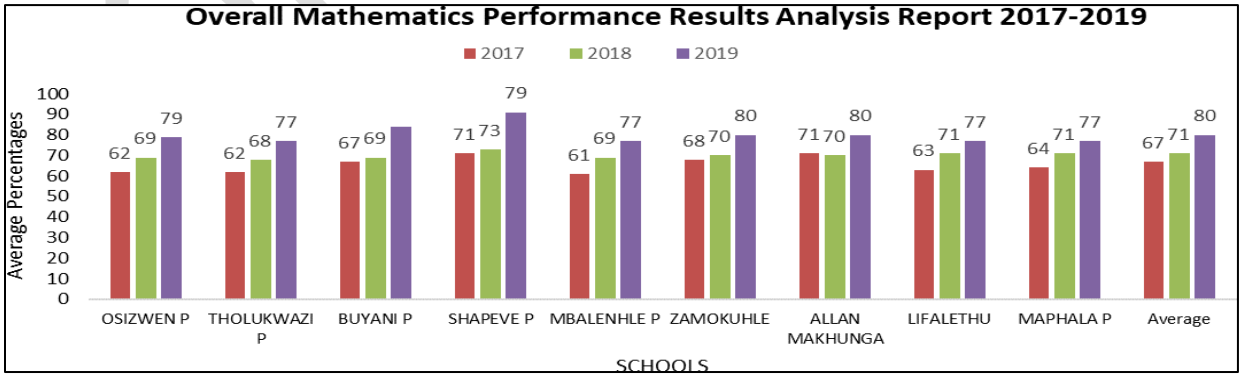


Figure 10: Three-year Grade R learner numeracy performance

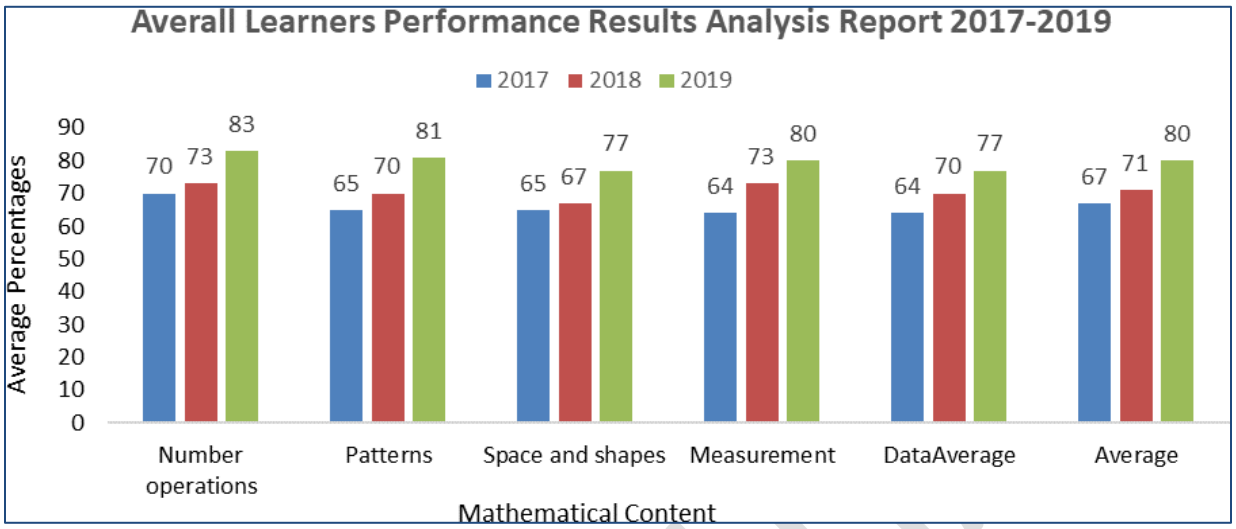


Figure 11: Three-year Grade R learner numeracy performance

Figure 11 presents comparisons between mathematical content marked and written recording of Grade R learners from the 2017 to 2019 in nine schools. There was an increased performance each year amongst the learners across all mathematical content indicating that the training that the teachers continuously received assisted them to improve their skills and content knowledge. All the schools made impressive progress, they performed above the 50% average as teachers were encouraged to set attainable objectives to build on the home background, conceptual knowledge and understanding of the learners.

5.2.2.1 Intersen Phase literacy and numeracy performance

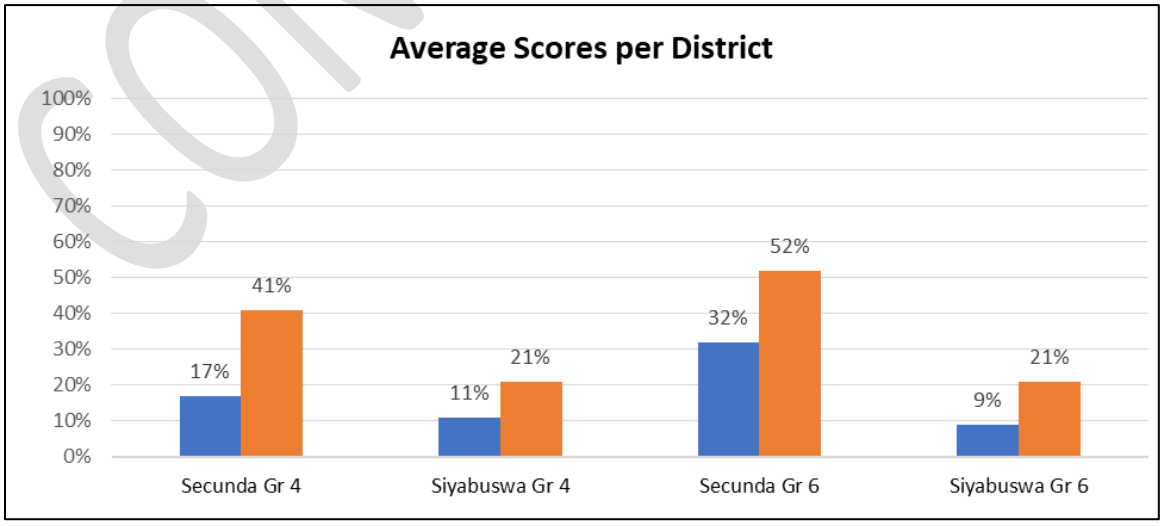


Figure 12: 2018 Intersen Phase literacy learner performance

The bar chart in Figure 12 shows average performance per district in Grades 4 and 6 for the year 2018. The Secunda Grade 4 learners improved by 24 percentage points and the Siyabuswa Grade 4 learners improved by 10 percentage points. The Secunda Grade 6 learners improved by 20 percentage points and Siyabuswa Grade 6 learners improved by 12 percentage points. While the improvement was significant, it is worth noting that only Grade 6 learners in Secunda were able to score on average above 50% by year-end[3]. In other words, even with the improvement as a result of the programme, the end result in terms of performance remained relatively weak.

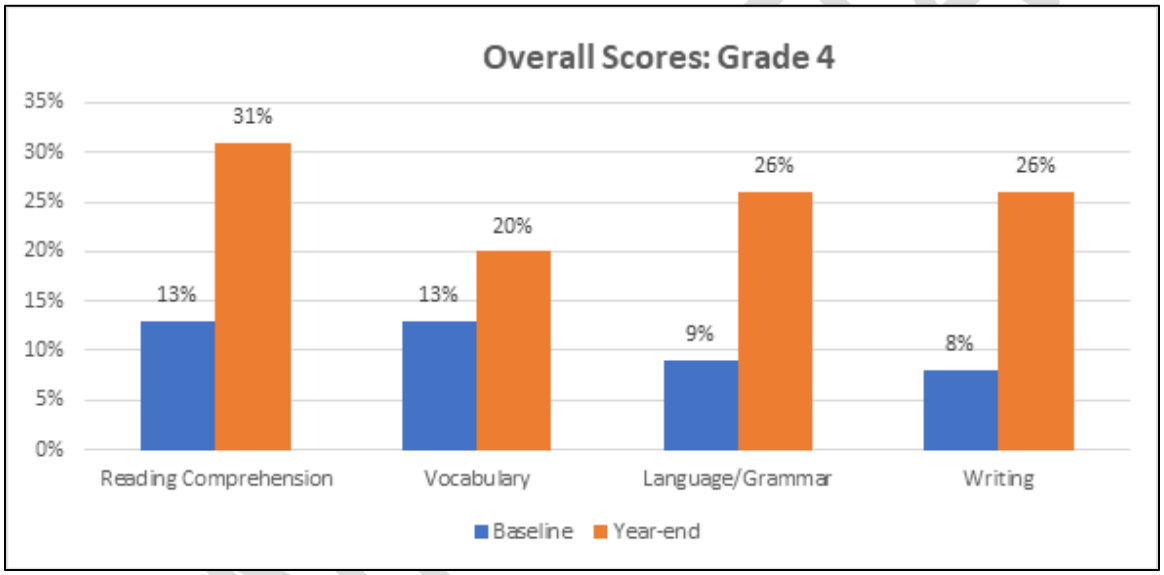


Figure 13: 2019 Intersen Phase literacy Grade 4 learner performance overall (Secunda and Siyabuswa)

The average reading comprehension baseline score for the Grade 4 learners was 13% and improved to 31% by year-end. Vocabulary increased from 13% to 20%, while language improved from 9% to 26%. Writing improved from 8% to 26%. Performance across the four categories has improved significantly from baseline to end-line.

[3] Although a 30% mark is considered a pass mark by DBE, for the purposes of this evaluation, we used 50% as a benchmark of a 'quality pass'.

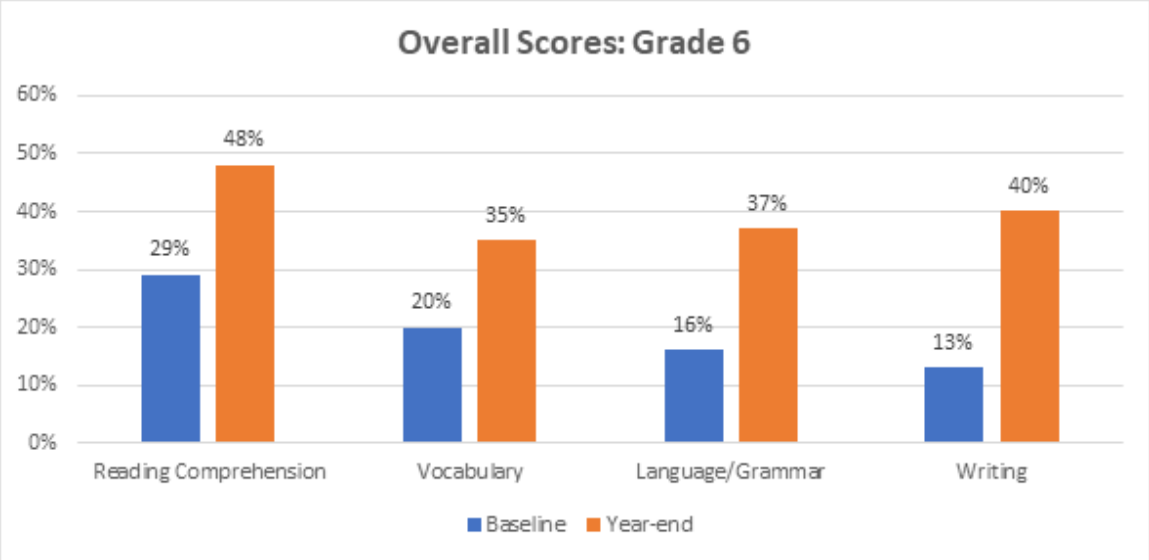


Figure 14: Intersen Phase literacy scores for Grade 6 learners overall (Secunda and Siyabuswa)

Grade 6 learners also demonstrated a significant improvement, with most learners now able to understand text at a much deeper level. It is worth noting that, while performance has improved significantly, the overall scores are still below the 50% mark, with reading comprehension closest, at 48%.

Based on the qualitative data from the schools, the factors that contributed towards the improved results are good stakeholder relationships; learner-conducive learning environments; gamification cards and snakes and ladder friend cards to stimulate problem solving, collaboration, critical thinking and constructivism in space and shapes; conceptualised experience; and introducing 4IR. Ongoing teacher support of content knowledge and curriculum pedagogy led to this improvement.

Overall, from the data presented, it can be seen that the interventions implemented in the earlier phase of the primary schooling led to more substantial improvement in learning outcomes as compared to the Intersen Phase.

5.2.2.2 Intersen Phase numeracy learner performance

Below are four graphs showing school-based comparative results from 2018 and 2019 per term from Grades 4 to 7 (note: it is not clear whether the data is for all schools in the programme, or only for some of the schools).

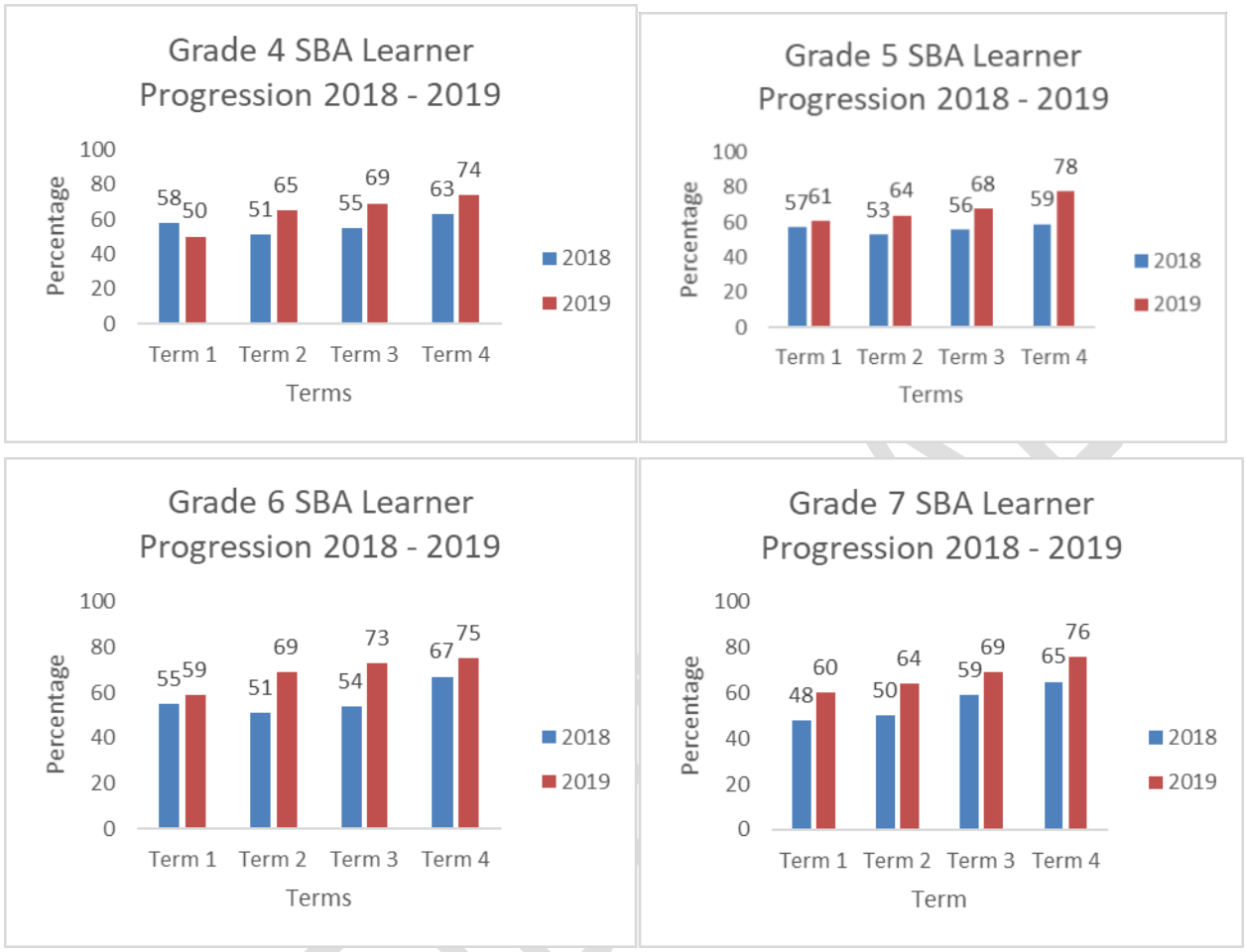
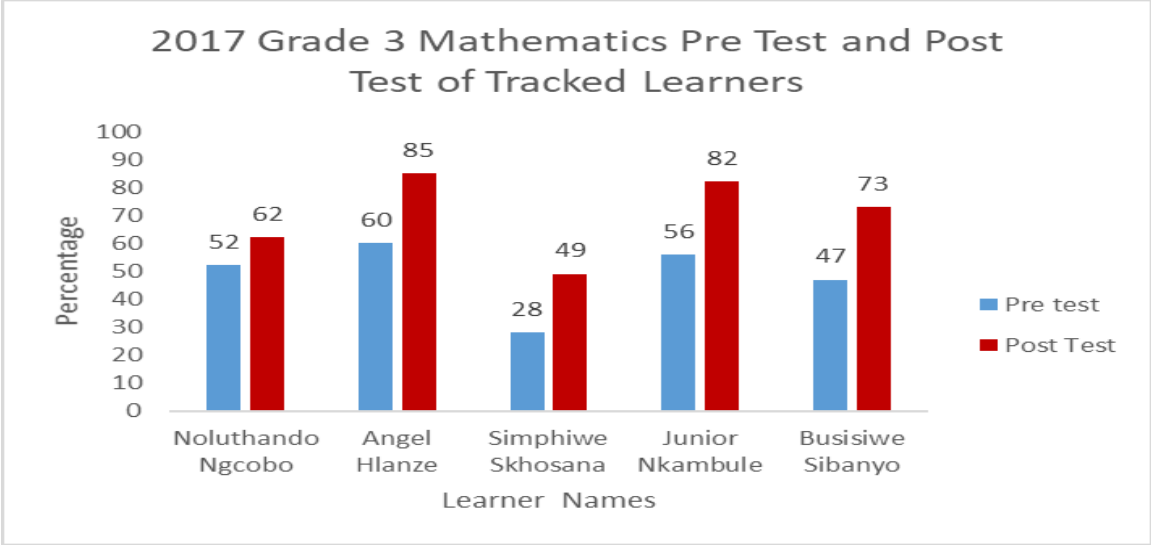
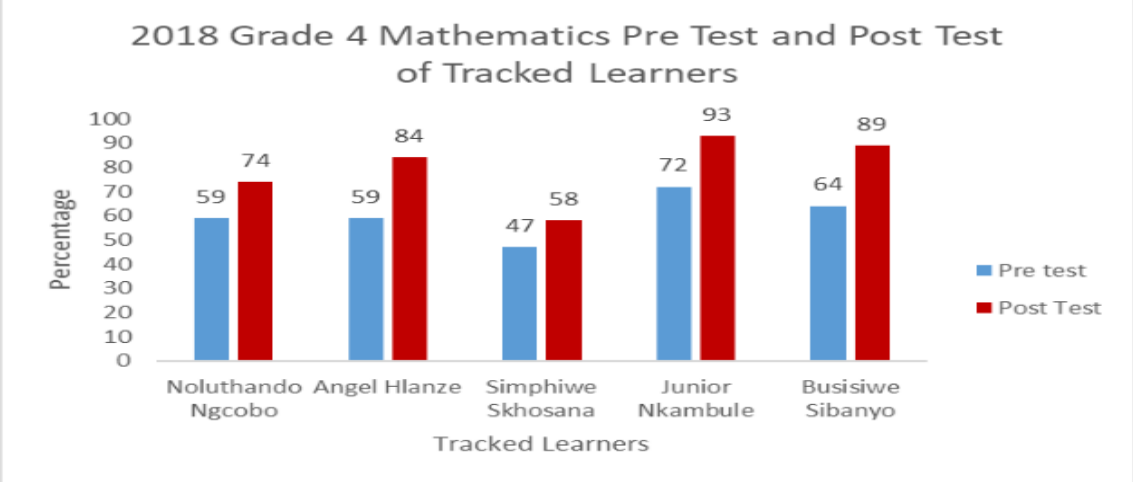


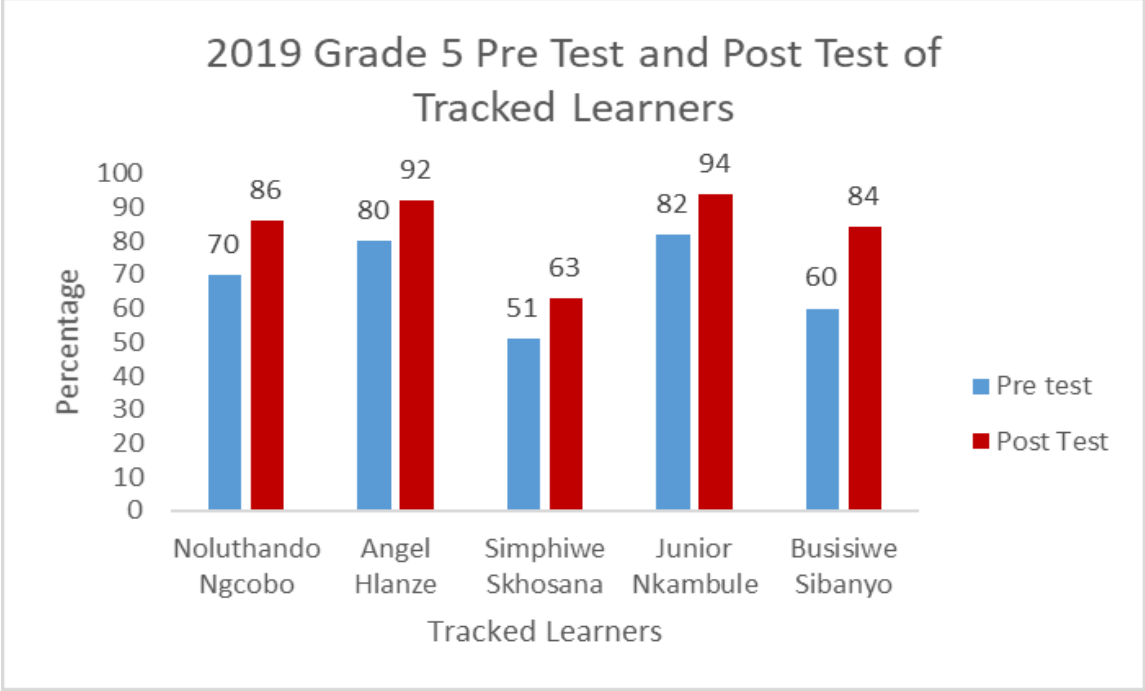
Figure 15: Intersen Phase numeracy performance

Learner performance improvement through the grades was consistent. With the application of various teaching strategies and techniques during teaching and learning; the use of material resources to enhance teaching and learning; learner involvement in their learning and the integration; mathematical language development, gamification; and 4IR strategies used during the lesson presentations, the conceptual understanding and problem-solving skills of the learners improved.

The graphs below show the performance of five learners who were tracked from 2017 in Grade 3 until 2019 in Grade 5. These learners show consistent gains year-on-year, although there is some evidence of learning loss over holiday periods; once learners go to following grade, performance drops from the previous year (note: programme documentation provided to the evaluation team did not clearly articulate why or how these particular five learners were chosen for tracking).


2017 Grade 3 Mathematics Pre Test and Post Test of Tracked Learners
Percentage
100
90
80
70
60
50
40
30
20
10
0
52
62
60
85
28
49
56
82
47
73
Noluthando Ngcobo
Angel Hlanze
Simphiwe Skhosana
Junior Nkambule
Busisiwe Sibanyo
Learner Names
Pre test
Post Test


2018 Grade 4 Mathematics Pre Test and Post Test of Tracked Learners
Percentage
100
90
80
70
60
50
40
30
20
10
0
59
74
59
84
47
58
72
93
64
89
Noluthando Ngcobo
Angel Hlanze
Simphiwe Skhosana
Junior Nkambule
Busisiwe Sibanyo
Tracked Learners
Pre test
Post Test


2019 Grade 5 Pre Test and Post Test of Tracked Learners
Percentage
100
90
80
70
60
50
40
30
20
10
0
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86
80
92
51
63
82
94
60
84
Noluthando Ngcobo
Angel Hlanze
Simphiwe Skhosana
Junior Nkambule
Busisiwe Sibanyo
Tracked Learners
Pre test
Post Test

5.2.3 Creating a conducive learning environment

The creation of conducive learning environments has been another major outcome of the programme. Developing a classroom environment conducive to learning is a process that entails staging the physical space; getting the learners to cooperate; creating a communal environment; and maintaining a positive classroom climate and environment for effective learning. A conducive learning environment is important because it encourages learner participation and cooperation.

According to the teachers interviewed, the materials provided by the programme made teaching more practical for learners to engage proactively in their learning and to enjoy learning. In addition, CAPS-related displays were stuck on the walls for learners to constantly engage with and learn during classroom time.

> *The programme provided learning aids such as books and sight word posters. It also introduced group reading clubs to the school as well as playful teaching. Teaching became more practical, which learners enjoyed. Learners are motivated to express themselves freely and enjoy lessons presented by Thebe.* ***Literacy HOD***

> *The programme provided demonstration lessons for teachers and resources such as books for the book corners, flash cards and other learning aids. Learners enjoy reading more and are excited to read for the class.* ***Literacy HOD***

> *Maths Centre provided learning aids such as 3D shapes, physical clocks and Maths 24. Teaching became more practical and easier to understand.* ***Numeracy HOD***

The teaching approach is as important as the learning materials provided. The training of teachers had a positive impact on the learners because the teachers were able to use resources provided effectively and were able to enhance learning in classes. All teachers that were part of the six on-site FGDs mentioned they benefitted immensely from the programme. They added that teaching and learning had been made much more practical, which benefitted those learners with learning barriers who had difficulty understanding abstract concepts. The teachers also reported that learners improved in mathematics and in literacy. This finding was corroborated by six principals who mentioned that the programme had a positive impact on schools because participation increased learner performance. Learners were now able to read with understanding, their spelling when writing has improved, and they could express themselves with confidence.

> *The impact on the learners or effectiveness is that the teachers have been trained to be able to use resources, create resources in order to stimulate and enhance the learning for the children.* ***Teacher FGD***

The teaching and learning have been made much easier because the learners are able to learn quicker, especially learners with learning barriers. ***Teacher FGD***

Quantitative data provided by the MCIS and RET shows that there was a significant increase in learner performance in both mathematics and literacy, which reinforces the qualitative findings. However, a key limitation is that the quantitative data was reported by the service providers, and the evaluators were not able to receive raw data from the schools.

5.2.4 Training of programme schools' HODs for systemic change and sustainability

The training of programme schools' HODs is another outcome of the Lit Num programme. HODs are the middle managers in schools who have a significant role to play in improving teaching and learning through supervision and control. In their function as outlined by the DBE, HODs supervise teaching and learning, ensuring that class activities are undertaken, that marking is done and that feedback on learner performance is given on time. HODs also conduct departmental meetings and assess teacher performance. They also have their own teaching allocation, as well as extra- and co-curricular activities.

While all these responsibilities are expected to be delivered by HODs, limited formal training or assessments are provided by the DBE to ensure that HODs deliver effectively. The MCIS and RET trained HODs as a strategy to ensure that HODs are professionally trained to coach teachers, orient new teachers appointed in the schools, manage phases efficiently and effectively and provide support to principals so that schools are run properly, and the CAPS curriculum is fully and properly implemented.

The RET and MCIS programme provided training to HODs on how to deal with the challenges they face with their staff, and how to provide development support for teachers. Although a firm conclusion cannot be made because of limited quantitative data from respondents on the effectiveness of the HOD training, there are indications that the programme had a positive effect on the schools, since HODs were trained on how to manage staff and to ensure teacher development. Teachers gained knowledge about effective teaching methods and about learner performance monitoring. One of the HODs mentioned that some of the teachers were still using the methods learned in class. When probing the objectives of the programme, there was insufficient data to provide information on the HOD training objective for sustainability of the programme beyond TF's implementation period.

The HODs were trained on how to deal with challenges they face with their staff. HODs also attended a workshop on how to provide development support for their staff. ***Literacy HOD***

5.2.5 Continuous support received from the Maths Centre and Read Educational Trust

The provision of continuous support to the 16 schools is another outcome of the programme. The funded service providers continuously provided support to the schools, which assisted the teachers to improve their teaching skills and provide continued curriculum guidance in order to improve learner performance. All teachers who were part of the FGDs reported that they were able to invite trainers to classrooms to assist them with challenges they had, and they received a great deal of support.

Without this support, it was going to be difficult for the schools to execute the CAPS curriculum, troubleshoot their own content gaps and be able to implement a practical learner-centred approach to teaching and learning.

Facilitators demonstrated effective teaching methods such as imitations on action words and teaching using flash cards and provided materials. ***Literacy HOD***

Tests were set for teachers and learners for assessment prior to commencing with the programme. Provided the teaches with effective teaching methods. ***Numeracy HOD***

There were regular workshops to build educators and assess support required and introduction of new teaching methods which encouraged learner-centred teaching. ***Numeracy HOD***

5.2.5.1 Improvement of confidence levels amongst learners

While there was no quantitative data available relating to improvement in learner confidence levels, some of the following results were observed during FGDs with learners as they were able to participate fully and articulate themselves clearly when responding to questions. These learners expressed the fact that some of the knowledge they had gained about their aspired careers was because they had read books in the library. The mathematics results have also improved, and learners are motivated to practice maths alone at home.

At first, understanding long-divisions and solving for X was a challenge, but now enjoying the subjects because of how the teachers teach these topics. ***Learner***

Helped to focus on studies. Enjoying reading, being disciplined, respect and forgiveness and life skills. ***Learner***

Teachers and HODs have observed improved confidence among the learners and an enjoyment of reading and public speaking. Below are some of the accounts from the KIIs conducted where the respondents were asked about the benefits of the programme on the learners' lives:

Learners were taken to the reading competitions with other schools and the learners were able to read both isiZulu and English. Learners performed very well in a different environment with different population groups. ***Literacy HOD***

Learners are motivated to express themselves freely and enjoy lessons presented by Thebe. ***Literacy HOD***

5.2.6 What is the extent to which the strategy met its objectives?

From 2013 to 2017, TF's strategic focus was on Grades 1 to 3 (Foundation Phase) literacy and numeracy. TF appointed MCIS as the lead implementer for numeracy and RET as the lead implementer for literacy. In 2017, the strategic focus changed to focus on Grade R and Intersen Phase (Grades 4 to 7). However, based on the documents provided by MCIS and RET, there was continued focus on Grades 1 to 3 up until end of 2017. There were no strategic documents provided for the rational and decision to change strategic focus areas to Grade R and the Intersen Phase.

However, regardless of the fact that no strategic plan provided for the 2017 to 2019 implementation period, MCIS's and RET's strategic objectives for the programme were focused on improving teacher and learner performance in schools, which is in alignment with TF's strategic objectives. The quantitative data for both literacy and numeracy show that there was an improvement in learner performance in literacy and numeracy and that TF's strategic objectives were met. On average, the Grade R overall performance was much higher in comparison to the Intersen Phase. The Grade R learners were able to improve their performance significantly in comparison to learners in the Intersen Phase.

5.2.7 How did the teacher-focused approach contribute to the success (or otherwise) of the programme?

The teacher-focused approached aims to capacitate teachers with sufficient skills to teach learners, to improve their pedagogical skills and to enable teachers to complete the CAPS curriculum. The approach taken during the training workshops was to first assess the capacity gaps of the teachers in order to provide tailored support and to cover the capacity gaps in teaching methods and learner

performance monitoring. Figure 16 is a visualisation of the hours that were spent on training teachers in 2019.

The teacher-focused approach helped to strengthen the programme. Findings from the study shows that teachers are now *au fait* with the CAPS curriculum and use it to manage classrooms and plan their work better. The abilities of the teachers were assessed individually in order to understand their development needs. Qualitative data collected from FGDs with HODs and teachers showed that educators benefitted from the teacher training.

> *The Maths Centre assessed educators teaching abilities to address their needs individually, they demonstrated working teaching methods teachers and provided resources that learners could use in lessons.* ***Numeracy HOD***

> *Teaching became more practical and easier to understand.* ***Numeracy HOD***

> *Support continued and the teachers were still assessed for further development.* ***School Principal***

The training of the teachers by both RET and MCIS helped the teachers develop a routine for the classroom, thus not only teaching learners discipline, but also empowering them to be able to manage time by following a daily routine. For instance, the word walls are a good example of the gains made by teacher training because they have been used effectively and interactively in the classrooms by the learners. Below are accounts of the teacher development approach and the outcomes of the KIIs and FGDs conducted with principals and teachers respectively:

> *For Numeracy: The programme assisted teachers with planning Math focus days; equipping teachers with practicing multiplication tables for only five minutes of each math period, and trained teachers how to use mathematics models. For Literacy: the programme assisted teachers with how to form a reading class, the purpose of the reading class and sustain these classes; there were dramatisation classes, mobile libraries, and Spelling Bee competitions.* ***School Principal***

> *Teachers attended workshops about better teaching methods and how to manage classrooms.* ***School Principal***

> *Teachers were given tests to check their understanding of how to plan for lessons and teach subjects.* ***School Teacher***

It helped because teachers were very cooperative and the facilitators were punctual and kept to agreed dates, which contributed to the success of the programme. Another thing is that the facilitators also engaged with the teachers first to understand challenges before actually starting with the actual training and observations. ***School teacher***

As can be observed in Figure 16, more time was spent training teachers in the Intermediate Phase, followed by Grade R and the Foundation Phase. Figure 16 also provides an indication of the emphasis the programme had on Grade R as it can be observed that an almost equal amount of time was spent on the Foundation Phase compared to Grade R (albeit that the Foundation Phase includes multiple grades). It is also interesting to note that a large portion of time was spent on Intermediate Phase training.

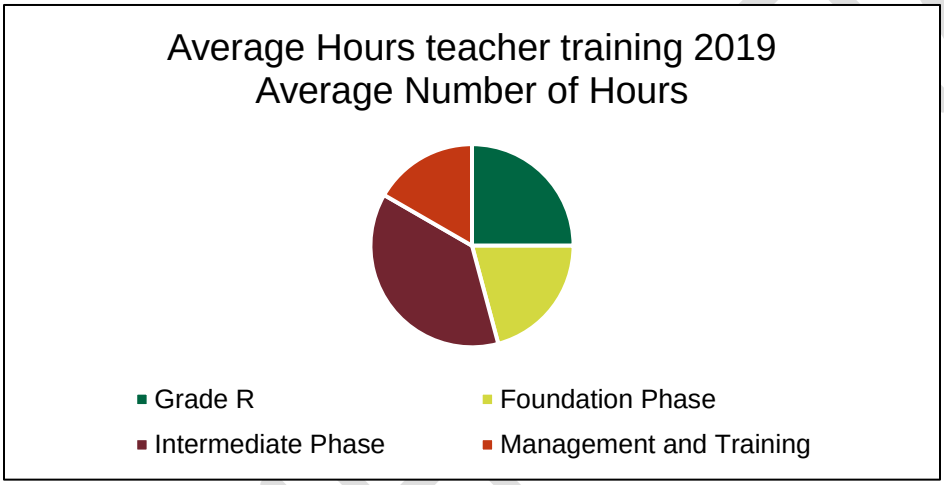


Figure 16: Professional development per teacher in 2019

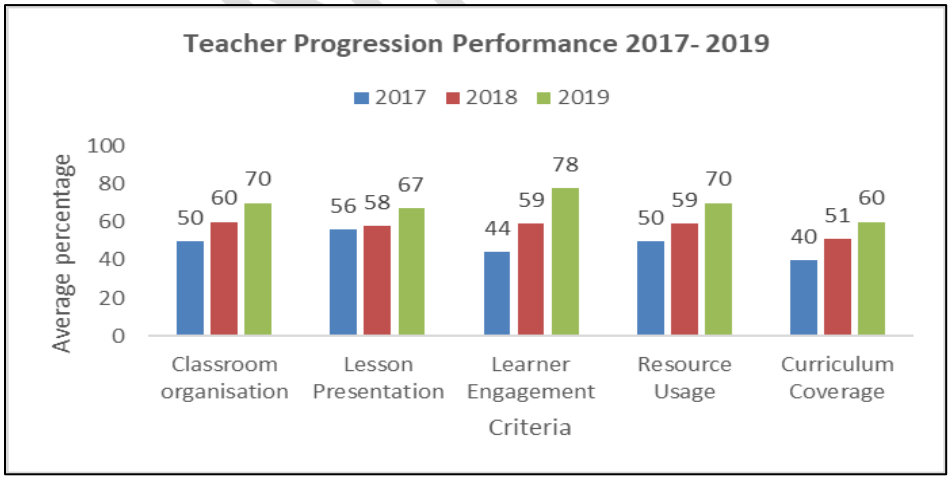
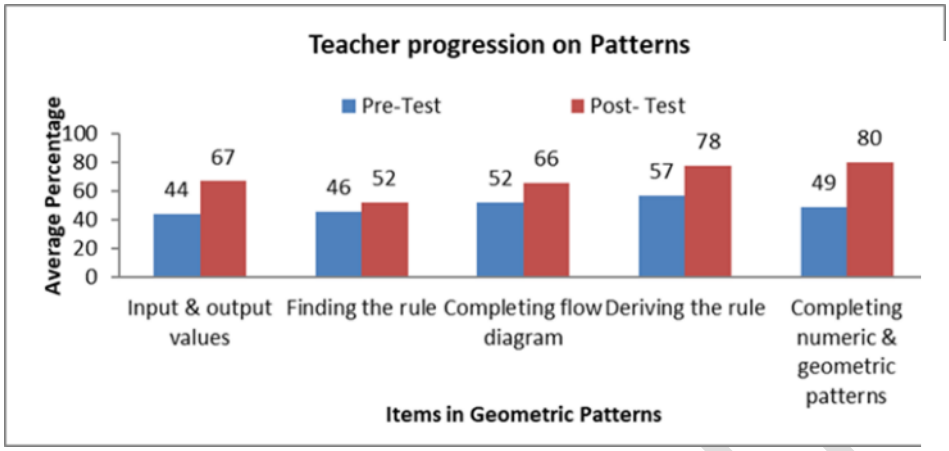


Figure 17: Numeracy teacher development performance overall (Secunda and Siyabuswa)

Figure 17 highlights an improvement in a number of different criteria that was observed in individual teachers during the classroom support visits across the three years of the intervention.



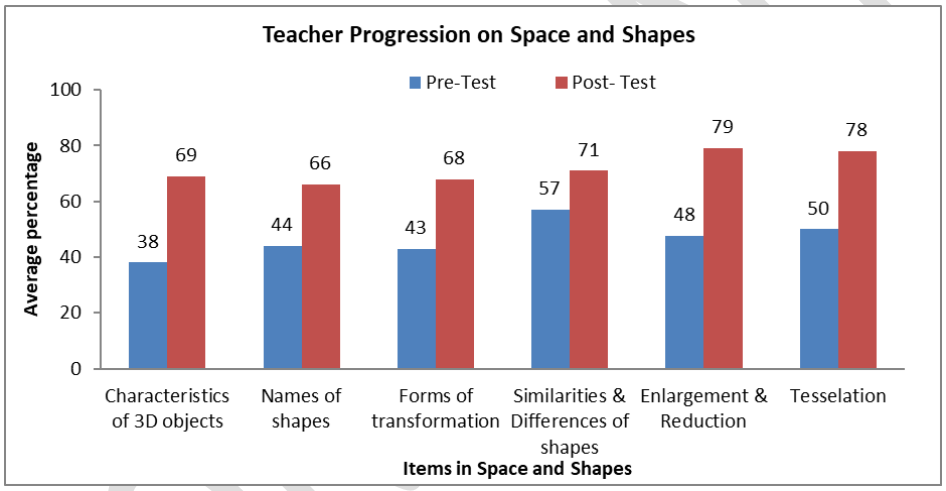


Figure 18: Numeracy teacher progression testing

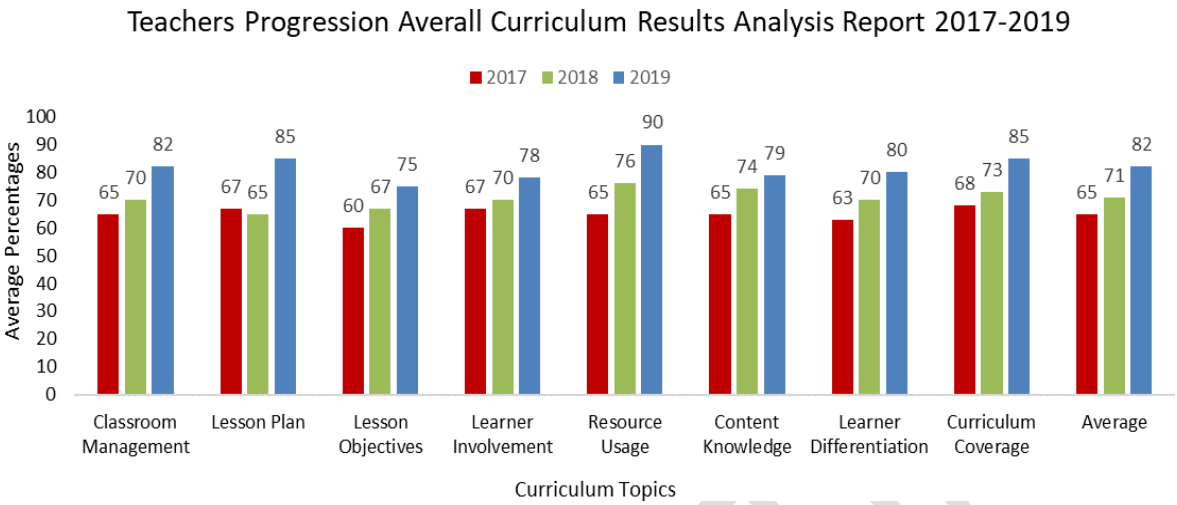


Figure 19: Curriculum knowledge

As reflected in the graphs above, teacher knowledge and practice improved over the course of the programme. The above bar charts indicate that teacher performance was lower at pre-tests and improved significantly at post-tests. The average performance in 2017 was 65% and significantly increased to 82% in 2019.

Although RET's reports do not contain quantitative data on teacher performance, learner performance results are a good indication of the quality of teaching methods. The numeracy quantitative data shows that the focus on teachers assisted them to not only be able to cover the CAPS curriculum, but also to acquire the skills required to manage classrooms and complete the curriculum. However, for future programmes, it is important that this data is collected in order to be able to effectively measure the effects of the programme.

In addition, it is evident from the findings, that supporting early interventions that target learners in lower grades in the schools is particularly effective. The improvement in performance was larger in Grade R than Intersen. In numeracy, for instance, early learning interventions are beneficial as the subject is hierarchical in nature, thus showing the importance of building concepts as learners progress within their primary schooling. The support that educators, therefore, received in the Foundation Phase assisted them to acquire the pedagogical skills necessary to build maths concepts early in the lives of the beneficiaries.

5.2.8 What lessons for scaling and replicability can we learn?

Lessons learned are discussed in this section. These lessons should be used in future iterations of the programme to ensure smooth implementation, as well as impact in the Lit Num programme.

5.2.8.1 The teacher-focused approach

A key lesson learned with the implementation of this strategy is the importance of focusing on a teacher-focused approach. It is evident from the findings that the teacher-focused approach contributed to programme success and improved learner outcomes. The training of teachers ensured that they were able to deal with their own content gaps first, hence improving their content knowledge and teaching skills. The training also helped the teachers to finish the CAPS curriculum, create classrooms that were conducive to learning, manage classrooms effectively and provide teaching support to learners, as and when needed.

The teacher-focused approach is a key activity that is required for scale and replicating the programme to other schools because there is evidence that it is beneficial to the learners when teachers are properly trained and prepared to teach.

5.2.8.2 Collect routine monitoring data for programme monitoring

The collection of routine monitoring data during programme implementation is a key lesson that has been learned for scalability and replicability. The collection of data, using pre- and post-assessments is important since it will allow TF to measure learner outcomes during programme implementation. It is also imperative that TF houses raw data centrally, as opposed to relying on funded partners to store and manage this data on their behalf. If TF has access to this data, they will be able to perform data quality checks, and undertake data audits and comparative analysis of learner performance as received. For instance, pre- and post-test monitoring data on literacy is lacking. Processed data received from the funded partners does not provide TF autonomy and the opportunity to undertake data analysis. Moreover, data quality checks will also be difficult if TF does not have access to the raw data.

5.2.8.3 Provision of resources

Another lesson that has been learned for scalability and replicability is the provision of resources to schools, and follow-up support to ensure that resources are used. The provision of books and libraries provided the schools with additional resources to be able to teach the learners and to respond to their needs. Resources are key to the replication of the programme because most schools struggle to provide learners with adequate resources to help them to learn. It will always be difficult to improve learner support without additional resources. TF should therefore continue to provide additional resources when scaling up and replicating the programme to new schools.

5.2.8.4 Effective communication and collaboration

One key lesson learned from programme scaling and replication is the need to establish effective communication. Effective communication between the schools and the programme implementers is required and can be done by creating a plan that aligns visits of trainers and funded partners with school timetables. This will make it easier for schools to accommodate these visits.

This was a consistent theme of improvement mentioned by HODs across all the FGDs and KIIs. They were of the opinion that effective communication will improve the attitude of the teachers towards the programme as they often had to deviate from their teaching plan to accommodate the programme implementer's plan. One of the school principals was quoted saying:

> *Departmental subject advisers need to be included in the initial programme implementation to avoid competition between subject advisers and facilitators and reporting meeting to be held every semester to monitor the programme and ascertain support needed at the school.* ***School Principal***

This was echoed by other principals who believed the programme should consult the schools to align programme implementation with the school's annual teaching plans:

> *The timing of the project must be improved to be in line with the school plans. MCIS and Project READ must involve the school when they are at the planning phase of this intervention.* ***School Principal***

The teachers added that, in order to sustain the programme, there should be more collaboration between the DBE and TF. Stopping the programme abruptly should be avoided (as happened in 2016) and, where there is such a case of discontinuation of the programme by TF, the DBE should look to fund the programme.

5.2.8.5 A need to strategically focus on the Foundation Phase

The gains made by focusing on the Foundation Phase, as evidenced in the evaluation findings, cannot be underestimated. A lesson learned is that fundamental learning and teaching techniques are developed in this phase. Literacy concepts are hierarchical in nature and, in order to have a better understanding in the Intersen Phase, it is important that a strong foundation is built during Grades R to 3. Focus on Grade R alone may not provide learners with a strong enough foundation. It is important that the entire Foundation Phase receives adequate support and intervention to ensure that learners do not proceed along their primary schooling with gaps in their learning. In addition to developing literacy and numeracy competency, social and emotional coping skills – which sets learners up for success later in life – are developed during this phase.

5.3 Relevance

5.3.1 How relevant is the programme to Thebe Foundation's strategic initiatives?

Although there was no strategic plan for the 2017 to 2019 implementation period, the findings show that the Lit Num programme was in alignment with the strategic initiatives TF set out to achieve. The programme was able to support the roles and responsibilities of the HODs, teachers and subject advisers. Additionally, the programme improved subject knowledge and teaching skills, and provided support to, and supervision of, teachers. This is in line with TF's objectives of building strong communities through basic education.

5.3.2 How relevant is the strategy in light of the basic education needs?

The TF's literacy and numeracy teacher-focused approach to improve learner performance is in alignment with the National Development Plan (NDP), which is the blueprint for tackling South Africa's challenges and serves as a long-term vision and plan for the country. Chapter 9 of the NDP, titled 'Improving education, training and innovation', deals with the entire education system from ECD to advanced post-school studies. Chapter 9 builds on the vision for education, training and innovation. The proposed actions that are in alignment with the Lit Num programme are to:

- Lay a solid foundation for a long and healthy life, and higher educational and scientific achievement. This relates to ECD, basic education, further education and training and higher education.
- Build a properly qualified, professional, competent and committed teaching, academic, research and public service core. This relates to quality ECD learning, schooling, basic education, further education and training, higher education and the national system of innovation.

There is an alignment between TF's focus on Grade R as critical for ensuring school readiness and government's five-year strategic plan, the Medium-Term Strategic Framework (MTSF) (2019–2024), which is in support of the NDP's strong focus on improving the quality of schooling. The MTSF brings to the fore the importance of early grade reading as a critical enabler of all other learning. The MTSF is clear that a shift of ECD services to the basic education sector should come with a clear national policy framework for preschools, and with better monitoring systems, including systems to gauge the school readiness of children when they enter Grade 1. The MTSF elaborates

on certain aspects of the NDP's support and accountability goals, as well as the fact that better support for Foundation Phase teachers is needed.

TF's programme is also in alignment with the Basic Education Sector Action Plan to 2024: Towards the Realisation of Schooling 2030. The action plan is based on 27 national goals that are intended to improve basic education at all levels. Six of these goals are in alignment with TF's Lit Num programme. These are:

- Goal 1: Increase the number of learners in Grade 3 who, by the end of the year, have mastered the minimum language and numeracy competencies for Grade 3.
- Goal 2: Increase the number of learners in Grade 6 who, by the end of the year, have mastered the minimum language and mathematics competencies for Grade 6.
- Goal 7: Improve the average performance of Grade 6 learners in languages.
- Goal 8: Improve the average performance of Grade 6 learners in mathematics.
- Goal 11: Improve the access of children to quality ECD below Grade 1.
- Goal 12: Improve the grade promotion of learners through Grades 1 to 9.

The action plan also clarifies issues relating to the steady and relatively good improvement, off a low base, in the quality trends seen in South Africa's scores in international testing systems. Five likely contributing factors are identified: clearer curriculum guides for teachers; better access by learners to high-quality books; better assessment practices; improved subject knowledge among newly graduated teachers; and better access to Grade R. All these contributing factors are in alignment with TF's programmatic teacher-focused approach, which contributes to better learner performance.

5.3.3 What is the extent to which the programme responded to the beneficiary needs?

The programme responded to beneficiary needs to a large extent. Evidence has been provided from the teacher-focused approach discussion that the programme benefitted teachers by providing them with the skills required to cover the CAPS curriculum; enabling them to deal with their own content gaps so that they are able to teach learners effectively; and being able to manage classrooms at the same time. The training that HODs and teachers received has helped them to improve learner performance.

On the other hand, learners also benefitted immensely from the programme, especially those who are in the Foundation Phase, and particularly Grade R. The programme responded to beneficiary needs by ensuring that the strategy provided extra support through various activities, like teacher and HOD training, the provision of reading materials, establishment of numeracy and literacy hubs

and the provision of libraries. All these resources ensured that learners had access to all the resources they required to continue with learning in order to improve learner support.

5.4 Effectiveness

5.4.1 What are the successes of the programme? What has the programme achieved to date?

5.4.1.1 Improved learner performance

There has been an observed improvement in learner performance post-programme implementation. This was not only observed through FGDs, where there was an observably high level of confidence among the learners, but also monitoring data that was reviewed demonstrated positive change. The baseline data collected revealed that, in 2017, the Grade R group that was tested showed satisfactory performance for baseline, achieving an average result of 65%, indicating good preschool literacy learning skills. This improved to 90% at year-end, indicating that the group, by and large, have attained the necessary skills to cope with formal schooling. In 2018, Grade R learners from Secunda improved by 44 percentage points and 43 percentage points in Siyabuswa since the beginning of the year. In 2019, learner performance in the early learning test improved significantly through the year of instruction.

In 2018, the literacy Intersen Phase average project improvement was between 6% and 8%. The Secunda Grade 4 learners improved by 24 percentage points, and the Siyabuswa Grade 4 learners improved by 10 percentage points. The Secunda Grade 6 learners improved by 20 percentage points and the Siyabuswa Grade 6 learners improved by 12 percentage points. While the improvement was significant, it is worth noting that literacy scores failed to exceed 50% (except for Grade 6, which was at 52% at end-line). For instance, the Siyabuswa Grade 6 and Grade 4 average score moved to 21%, which is still low. It is evident that, while learner performance showed an increase, a great deal still needs to be done in order to push learner average scores higher. In 2019, the average baseline score for the Grade 4 learners was 13%, which improved to 31% by year-end. While there has been a significant increase in the learner performance (comparison to baseline and end-line), the overall performance in the Intersen Phase has been poor, with the highest score at 31%. The overall performance across all scores has been below 50%, which indicates that the intervention in the phase has not been as successful as hoped. Grade 6 learners also showed a significant improvement, with most learners able to understand text at a much deeper level. It is worth noting that, while performance has improved significantly, all overall scores were still below the 50% mark, with reading comprehension closest, at 48%. The performance in

the Intersen Phase is different from that in Grade R, where learners were consistently able to improve their performance to above 50%.

Overall, Grade R performance improvement has been more substantial compared to Intersen Phase performance. The interventions implemented in the earlier phase of primary schooling had greater impact than that implemented in the Intersen Phase. This finding is relatively unsurprising, as the substantial backlogs in South African schools have been well-documented. The earlier schools, teacher or programmes are able to intervene, the greater likelihood that backlogs can be confronted before they grow dramatically. Therefore, Grade R and Foundation Phase programmes are likely to show more significant improvement than interventions that take place in later years.

5.4.2 What are the constraints of the programme?

It is worth noting that programmatic challenges stem from systemic challenges, as discussed in the literature review section. The section below discusses challenges that were identified from the evaluation as constraints to the programme.

5.4.2.1 Poor communication

The most prominent challenge stated by the HODs and principals was poor communication between the programme implementers and the schools. It was stated that the programme was not aligned to the school's teaching programme and schedule. Some of the site visits by the programme implementers clashed with school meetings. Timetable clashes resulted in teachers having to discontinue their work to follow the lesson plan of the programme, which created tensions and resistance among teachers

> *There was resistance from teachers. As managers, we need to learn more about the project first so that we can be able to explain to the teachers and avoid resistance. There was a perception that the programme brings a different approach to the school. However, with time, it was realised that the programme is helping.* ***Literacy HOD.***

> *Thebe timelines would clash with the teaching plan and lessons that were in progress.* ***Numeracy HOD.***

Another challenge was that learning materials were not sufficient for all learners, which negated effective learning through demonstrations, especially in cases where classrooms are overcrowded.

> *Not enough resources for learners to take home for more practical lessons. Overcrowded classrooms make group teaching difficult.* ***Literacy HOD***

5.4.2.2 The 2016 implementation disruption

There was a disruption of implementation of services in 2016 as a result of changes in leadership at TF, as well as a lack of funding to continue with implementation of services. During that year, funding was secured from Shell South Africa, which was not sufficient to implement all the services as planned initially. This disrupted the provision of services and continuity of the programme for a full year. Implementation continued in the following year (2017) and the funded partners had to reimplement some of the services that they had already implemented in 2015 to ensure that the schools and teachers were able to pick up on activities that could not be implemented in 2016. This incident provides an important lesson learned in terms of multi-year programme planning. If TF continues to support schools over several years, which the evaluation team would support, it is important that budgeting and planning takes place to ensure sufficient funding remains available through the period of commitment.

5.4.2.3 Educator attrition

To an extent, educator attrition impacted on the programme negatively in the funded schools. Some teachers either transferred to other schools or were promoted to senior positions. While it can be argued that the lateral transfer benefitted the education system, this did not benefit the programme schools. For instance, Sithabile Primary School was removed from the sample, not only because of Covid-19, but also because a large number of educators who were supported by the programme left the school, thus impacting on sustainability. It is worth noting that this finding was a recurring theme from qualitative findings, but no quantitative data was provided to confirm the extent of the problem. In future, it will be beneficial for TF to track quantitatively the number of teachers that benefitted from the programme versus those that have left in order to effectively measure attrition rates.

5.4.2.4 Limited parental involvement

One of the challenges that came out of the evaluation was that parental involvement was limited. The majority of learners in the schools that participated in these programmes come from poor socio-economic backgrounds. It was reported that some learners live with their grandparents, who are more likely to be illiterate themselves; come from child-headed households; or are orphaned and vulnerable children. Illiterate caregivers are unable to help children with their homework and help them learn at home. Other parents were unable to assist their children because of their unaccommodating work schedules and laborious jobs, since it was reported that most children were from households where parents are absent. Many parents were employed at Sasol in Secunda, while other may have been working in Johannesburg or other big cities.

Parents are unable to assist learners with homework. ***Literacy HOD.***

Parents not really involved in the programme, following up on them is difficult and attendance on meetings was poor. ***Literacy HOD.***

Learners should be motivated and assisted by their parents in participating actively. ***School Principal.***

5.4.2.5 Limited extensive training for HODs

Training of HODs is a critical element of programme sustainability. According to the data collected and the findings from the document review, there were no pre-and post-assessments of the HOD training. In addition, in the context of the high teacher attrition in South Africa in rural schools, it is critical that HODs are highly capacitated and trained to be able to monitor how teachers are teaching. Although workshops are important, it is critical to assess the HODs' level of understanding so that they can strengthen teaching and hold teachers accountable to CAPS and overall quality. This will not only benefit current learners, but also future learners as well.

5.4.2.6 Subject advisers' heavy workload

Another key systemic challenge emanating from the evaluation was the heavy workload of subject advisers, since they are responsible for a number of schools. According to DBE, some subject advisers are responsible for the whole of Foundation Phase and may even advise from Grade R to Grade 7. The findings from the interviews with the subject advisers show that the Nkangala subject adviser was responsible for Grades R to 3 in all the schools where the programme was implemented in Nkangala, while the Gert Sibande the subject adviser was responsible for all levels from ECD to Grade 9 in all the schools in which the programme was being implemented in Gert Sibande. This heavy workload means that subject advisers are heavily reliant on programme implementation partners, such as RET and MCIS, to conduct routine monitoring of learning and teaching in schools and to ensure the effective implementation of the CAPS curriculum.

5.4.2.7 Poor teacher training and inadequate preparedness for teaching

The key informants from MCIS and RET reported that poor teacher training and inadequate preparation of teachers for teaching was identified as a major systemic challenge. The current teaching curriculum does not prepare teachers adequately for classroom management because they do not get practical teaching skills training. Teachers become highly dependent on programme implementation partners, like MCIS and RET, to solve this challenge. While the training provided by the MCIS and RET has been instrumental in reducing these challenges in the programme

schools, poor teacher training and inadequate preparedness for teaching remains a huge systemic challenge within the broader education sector.

5.4.2.8 Poor socio-economic background

Learners who benefitted from the programme through the schools come from communities that are characterised by high unemployment rates, and some of the learners have parents/caregivers who struggle with literacy skills and are unable to assist them with their education. These factors influence effective learning, as some learners may go to school hungry and, thus, not be able to concentrate in class if they do not receive a meal at the school. Learners with illiterate parents/caregivers are left further behind at school because they are unable to receive assistance with their homework and learn at home. This negatively affects how these learners keep up with the curriculum.

Safety of learners also remains a concern in some of the villages and townships. Because of the working conditions and hours of the parents/caregivers, learners' safety is at risk.

> *Parents work far from home, learners come late to school. How safe are the children in the village when parents are away to work from trafficking of children? Even the police came to the school to discuss these issues.* ***School Principal.***

5.4.3 What is the extent to which programme objectives were achieved considering their relative importance?

The approach that was used to answer the evaluation question was to firstly to explore the programme evaluation objectives using various methods, such as document reviews, interviews with key informants and FGDs with educators and learners. Secondly, the extent to which these objectives were met is explored using the findings from the data collected from the aforementioned groups.

5.4.3.1 Programme objectives

From the FGDs with various numeracy and literacy teachers, their understanding of the objectives of the programme was to improve the learners' learning ability and their understanding of mathematics and language. These objectives are i) to create an understanding of the correlation between numeracy and literacy, encourage visual teaching and make learning fun; and ii) to identify problem areas for both teachers and learners and to assist teachers on teaching methods and enhancing the learning experience for children.

The objective of the programme was to assist teachers with identifying issues on literacy and numeracy and to equip educators with better teaching methods. ***Primary School Teacher***

Similar accounts were found in interviews with the principals, whose understanding of the objectives of the programme were to support teachers to improve on their delivery of lessons in order to enable learners to read, write, communicate better and improve their performances in numeracy and literacy.

Thebe Foundation was aiming to improving literacy and numeracy, as in South Africa there are low levels of numeracy and literacy most particularly in primary schools, as this is where the proper foundation is laid. ***School Principal***

From a numeracy perspective, the various mathematics HODs interviewed understood that the objective of the numeracy programme was to improve teaching and learning, particularly supporting learners with barriers to understanding mathematics and to instil a love of mathematics among learners in order to improve mathematics learning outcomes.

From the various literacy HODs perspectives, the objective of the programme was to improve literacy among learners who struggled to read with understanding and write effectively. These objectives were to be reached by providing teachers with training and workshops on how to engage with learners and on how make reading and writing more enjoyable.

The objective was to help learners to be able to apply different strategies and a different approach in mathematics and be able to work independently, be able to read for fun and to comprehend what they read. ***Foundation Phase Numeracy HOD***

Additionally, the key informants from the RET and the MCIS also understood the objectives of the programme the same way as the schools. They mentioned that:

The objective of the programme was to assist the Mpumalanga Department of Basic Education to address education challenges in numeracy and literacy. ***Read Educational Trust Manager***

Subject advisers also had a similar understanding of the objectives of the programme, stating that the objective was to develop teachers' capacity to teach mathematics and languages to ensure effective learning and understanding of key concepts.

The objectives were to train teachers on the methodologies for maths and literacy with the aim of improving performance of the learners, it was to train teachers on how to teach reading, teaching learners reading skills that are required to read with understanding and empower teachers to be able to teach learners the key skills required in maths for the four

basic operations that are in the Foundation Phase. ***Deputy Chief Education Specialist for ECD***

5.4.3.2 The extent to which objectives were met

The objectives of the programme were met to a large extent. Firstly, there was a common theme among the teachers who were part of the FGDs across all six schools that were visited. As noted, all teachers who attended FGDs from the Foundation Phase reported that the training had benefitted them. Further to this, it was also a major finding that numeracy and literacy hubs sparked interest in learning. With the three schools that were not visited as part of the evaluation, qualitative data was collected by telephonic KIIs, and this theme was also probed. Twelve numeracy and literacy HODs reported that the teachers who were part of the programme benefitted from their participation because, not only were their teaching skills enhanced, but they were also able to identify learners with learning gaps and provide further interventions to ensure that these brought up to par with their peers.

Subsequently, learner performance was improved based on the fact that teachers were trained and able to improve on their pedagogical skills, classroom management and ability to finish the CAPS curriculum in record time.

5.4.4 Efficiency

5.4.4.1 What is the cost effectiveness of the Lit Num programme?

Did TF use its resources efficiently?

Commentary is provided on the audited financial data that was received from TF. Qualitative data provided by the implementing partners revealed that the funding provided by TF was adequate to cover all the required activities in the school, except in 2016, when the programme was paused because of lack of funding.

A total of R18 001 365 was used from programme inception to 2019, when the programme ended, reaching a total of 85 709 (cumulative) students. As shown in Figure 20 below, this funding was spread across two school districts, with a surge in 2018 when an additional 46 districts were included in the implementation. Only R255 166 was spent in 2013, the year that the programme commenced. The amount spent rose steadily in 2014, 2015 and 2017. There was a decline in 2016, when only R962 090 was spent because of a lack of funding to continue with programme implementation. There was an increase in funding in 2018 and 2019, where R5 111 589 and R4 716 614 was spent, respectively. It is important to note that in 2018, the programme increased in scope to train HODs from additional 46 schools. These schools were not initially part of the

programme and were added because there was an increase in demand from these schools. The schools, however, were from the same two districts that had been funded since 2013.

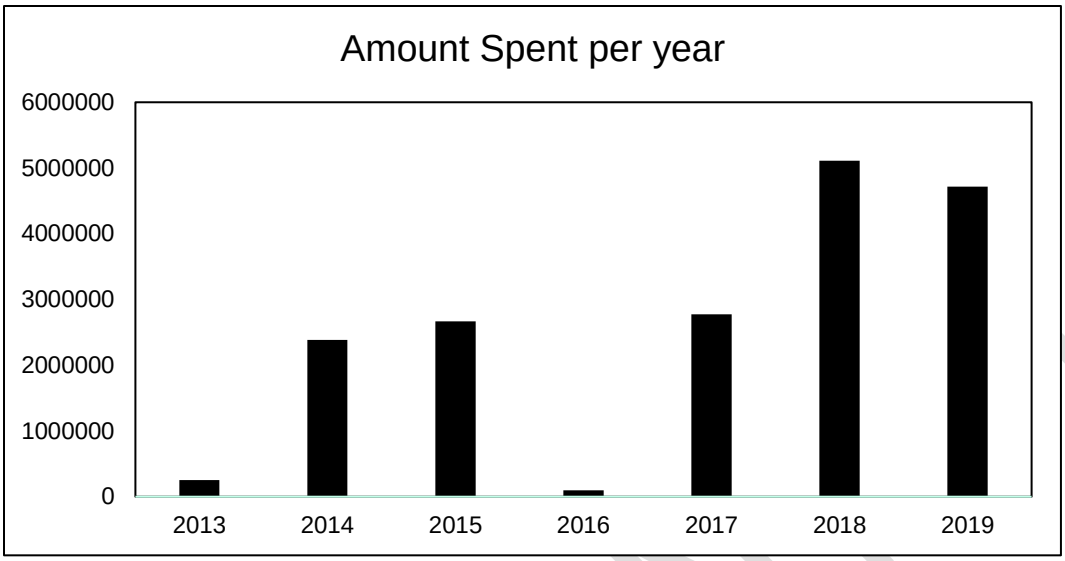


Figure 20: Annual expenditure

Financial resources

Financial resources were used effectively during programme implementation and there were no incidents of misuse reported. Resources were allocated accordingly per school to cover the training of teachers, to provide additional resources such as books and to establish numeracy and literacy hubs and libraries. However, in 2016, it is worth noting that there was no adequate funding to continue with the provision of services as only R962 090 was secured from Shell South Africa. The disruption of services was problematic because the funded partners, MCIS and RET, could not continue with service provision and were only able to resume service provision in 2017, when they again received funding from TF. Implementation of services meant that the partners picked from 2015 and much of the time was used to cover the 2016 implementation losses.

Human resources

The support provided by MCIS and RET was adequate for the provision of services in the 16 supported schools. The schools reported that they benefitted from the support/training that they received from the trainers. However, it is worth noting that the schools are heavily dependent on TFs funding because of this systemic gap in the education system. These schools reported that 2016 was a difficult year for them as the MCIS and RET could not implement the programme services.

5.4.4.2 What lessons can be learned from the efficient or inefficient use of resources?

It is important that funding is secured before implementation can take place. This will ensure that there is continued service provision for the duration of the project. It is important that TF should properly plan and allocate financial resources for the duration of the programme so that disruptions like the one that happened in 2016 are avoided.

5.5 Sustainability

5.5.1 Are the outcomes of the programme sustainable beyond the programme period?

Although the Lit Num programme resulted in improved learner performance, one of the findings from the evaluation was that, although HODs were capacitated through workshops, the effectiveness or the impact made as a result of this intervention is unknown because no substantial data on training was captured. There was also no post-training follow-up done by the implementation partners to monitor whether or not HODs were monitoring and inducting new teachers effectively. Based on this, HODs contributed to the sustainability of the programme to a small extent, and there is still a lack of sustainability in funded schools with a high dependency on MCIS and RET to implement and monitor the programme. Strengthening school systems to be able to deliver quality learning is critical in order to impact current learners and future learning. In order to ensure the sustainability of a programme, there is a need to strengthen and ensure continuity of the programme after TF is gone. This can be done by ensuring that the school leadership structure (SMTs and HODs) have a good understanding of the programme and are highly capacitated, well trained and know how to monitor the literacy and numeracy programmes.

Even when teachers leave, the school leadership structure should ensure that the new teachers that come on board are well inducted into the Lit Num programme, and that they are able to effectively monitor the programmes. It is important that the focus remains on ensuring the quality of the educational pipeline, not only for the learners currently in the school system, but also for those to follow. The pipeline refers to highly capacitated and motivated educators, and an effective school leadership. This sustainability plan will ensure that schools take ownership, accountability and responsibility for the programmes and move away from a dependency culture. This will also enable TF to be able to replicate and scale the programme to other schools.

The TF programme has resulted in improved learner performance. Teachers have improved in their teaching methods and are implementing their annual teaching plans (ATPs). There are now reading

clubs and maths hubs in the schools, as well school materials in the form of maths and literacy kits in these schools. Based on the findings, there is a good understanding of the programme on the part of the HODs and subject advisers that were interviewed.

6. Dr Enos Mabuza Scholarship Fund programme evaluation findings

The DEMSF programme findings are discussed in this section. The findings are discussed with a specific focus on the impact of the programme, its relevance to TF and DBE strategies, effectiveness, efficiency and sustainability. The quantitative findings provide statistics of reach data, amount of spend in rands as well as sociodemographic characteristics of the beneficiaries where possible.

The qualitative data provides findings on the extent to which impact was achieved, the experiences of the end beneficiaries with both strategic arms of the programme, challenges that were experienced and what the respondents' recommended about what can be done to improve the programme. The qualitative findings are an overview of the themes that emerged from the FGDs conducted with the students (one group of students who graduated and another group of students who were still studying), teachers, schools and key stakeholders from TF. Qualitative data allowed for an understanding of the impact the scholarship programme had on the project beneficiaries, as well as setting the scene for adaptive management using lessons learned.

The structure of explanation follows a reporting of themes, a description relating to the theme as well as a supporting quote from an FGD, surveys or key informant participant.

6.1 Objectives of the programme

The objectives of the scholarship programme are to allow academically adept students who are studying towards a scarce skills degree and are from poor socio-economic backgrounds to obtain a degree so as to become active economic participants in the country, either through employment or venturing into entrepreneurship.

In addition to the financial support of paying tuition, the students had their meals, books and accommodation paid for, so they had all the resources they needed to complete their studies.

Table 19: Support provided

Type of support	Description
Financial support	Tuition, transport, accommodation, meals and books
Non-financial support	Psychosocial and academic support

6.2 Description of participating HEIs

The HEIs TF has partnered with on the scholarship programme were a diverse mix of traditional, comprehensive and vocational tertiary institutions. Two of these HEIs, namely UCT and Wits, are ranked in the top 200 institutions in the 2019 edition World University Rankings published by Quacquarelli Symonds, while two more, UJ and UKZN, make it into the top 800 institutions.

Table 20: Description of the participating HEIs

Institution name	Category	Description
UJ	Public university	Academic (degree qualifications) focus
UMP	University of technology	Vocational academic (diploma/degree qualifications) focus
SPU	University of technology	Vocational academic (diploma/degree qualifications) focus
UCT	Public university	Academic (degree qualifications) focus
UWC	Public university	Academic (degree qualifications) focus
Wits	Public university	Academic (degree qualifications) focus
CJC	Technical Vocational Education and Training College	Vocational training focus
UKZN	Public university	Academic (degree qualifications) focus

6.3 Characteristics of the end beneficiaries

Killian (2013) defined a social licence to operate as:

> Community goodwill in the form of a 'social licence' may be seen as something that can be taken away, but formalised social partnerships go beyond that and begin to talk about social value and the ongoing nature of mutually dependent relationships. Partnerships, by their very nature, suggest a journey, a process and a marriage of sorts- something you have to work on, nurture and keep in good repair.

That definition above aligns with the core foundation of the programme, which aims to support financially needy students at HEIs, thereby contributing to the development of higher education graduates who are confident and proud of their African identity and heritage; academically and socially adept; and are equipped with the skills and competencies enabling them to become successful professionals in their careers.

A total of 49 students responded to the survey (Figure 21). This number surpassed the 28 target that was representative of the 30% sample initially proposed. Of the 49 students who took part in the survey, 20 had graduated during the time of the study, while 29 were still studying. This gave a balanced view about the end beneficiaries' experience of the programme. There was also a balance between male and female respondents, which provided a balanced gender view of the experiences of the scholarship programme. Only one student indicated that they had a disability in the form of visual impairment.

Surveys were sent out using SurveyMonkey to all students in the database that we received from the programme consultant (Appendix B). These surveys were semi-structured in nature, were both quantitative and qualitative in approach and collected data on the interventions, processes of applying for the scholarship programme and the challenges that the students encountered at both the participating HEI and TF levels. The survey then concluded by collecting key data on what could be done to improve the scholarship programme to maximise its impact on end beneficiaries.

This section presents the findings from the data that was collected from the students. This data is triangulated with findings of the FGDs as well as the document review. Additionally, this section poses programmatic recommendations based on the challenges identified in this section.

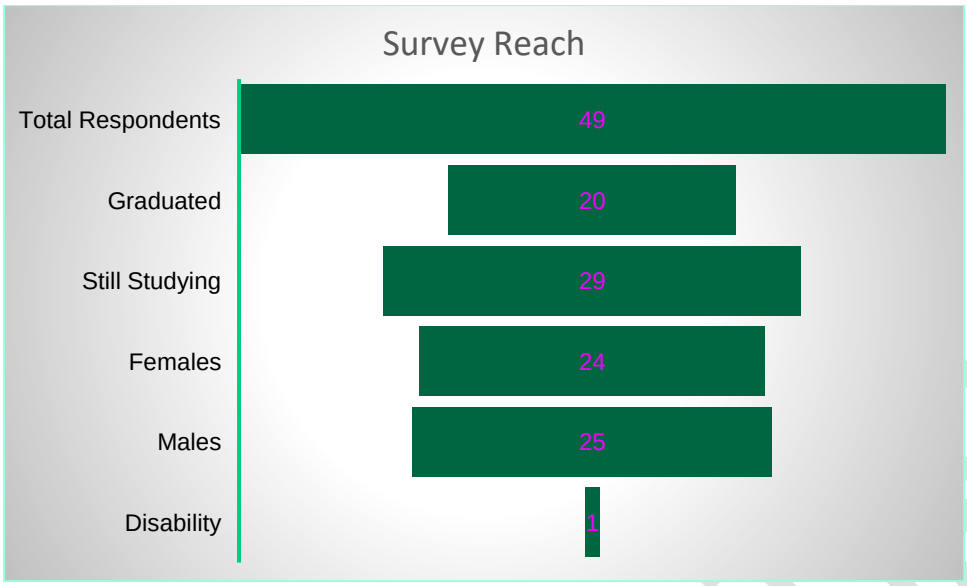


Figure 21: Survey reach

The demographic data that was collected as part of the evaluation relates to the number of students who formed part of samples disaggregated by race, institution name and degree of study (Figure 22). In order to determine the socio-economic status of the students, further data was collected on the type of dwelling at home (Figure 23).

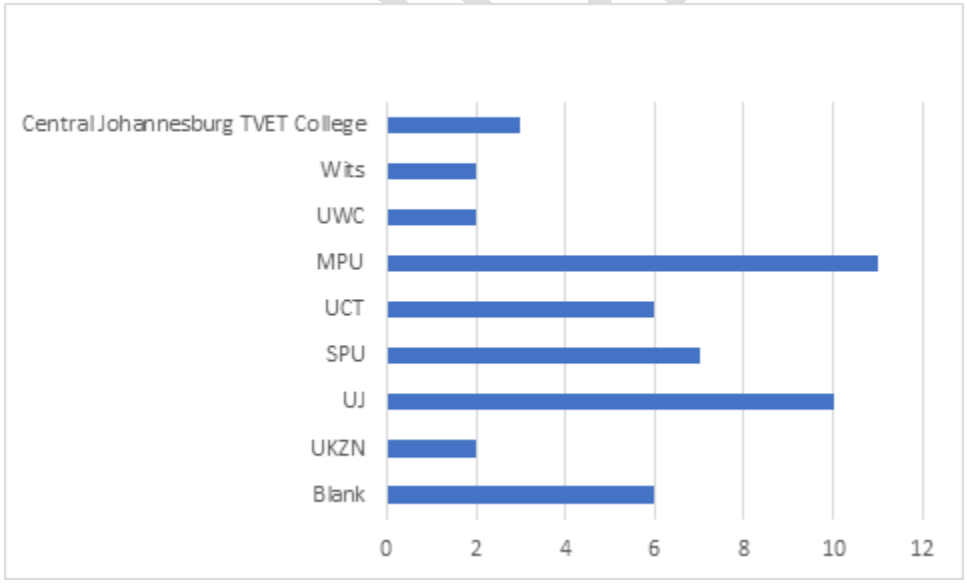


Figure 22: Student responses by universities

Respondents to the survey represented all eight HEIs. Of the 49 students who took part in the study, MPU had the highest representation with 11 responses, followed by UJ with 10 responses. Six students did not indicate which institution they were from.

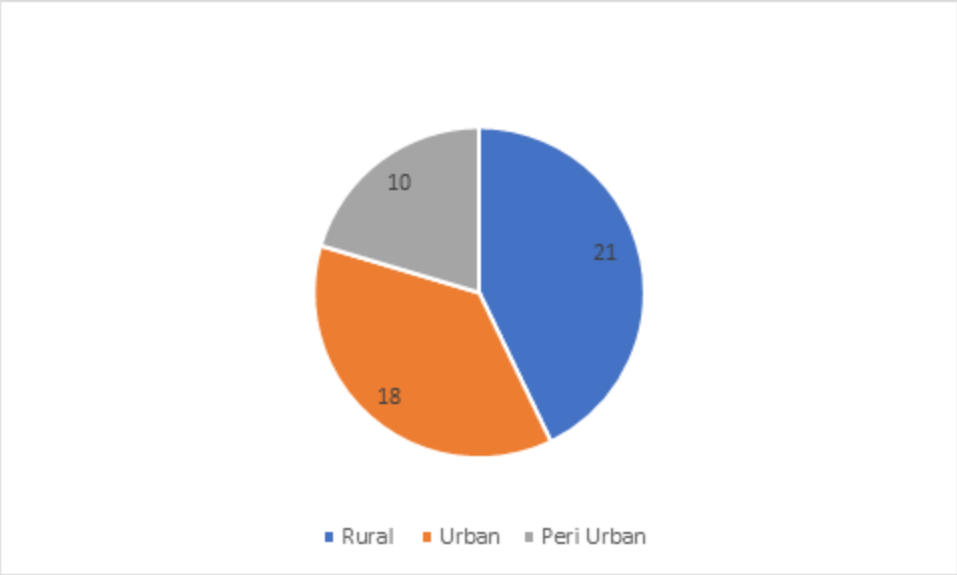


Figure 23: Category of home area

Almost half (21) of the 49 students who responded to the survey were from a rural area, while 18 indicated that they were from an urban area.

6.3.1 Where the students heard about the Dr Enos Mabuza Scholarship Fund programme

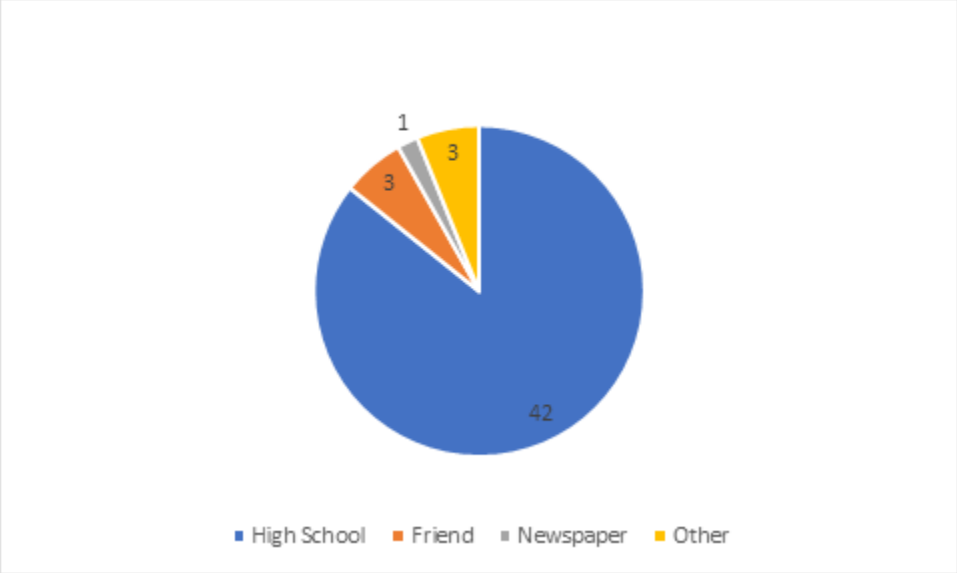


Figure 24: How did you hear about the programme

The majority of the respondents mentioned that they heard about the scholarship programme from their high schools, while three of them indicated that they heard about the programme from friends (Figure 24). This finding speaks to the fact that the DEMSF programme is well marketed and well known.

6.4 Dr Enos Mabuza Scholarship Fund programme implementation

This section discusses the implementation approach that was used to implement the scholarship programme.

6.4.1 Recruitment process

Recruitment is not outsourced but is undertaken internally by the participating HEIs, which used platforms like the *mycareer* portal to recruit students into the programme. The HEIs use internal platforms to advertise the programme, such as sending out emails to all students, pinning notices on notice boards, advertising on websites and making a scholarship booklet available from the institution's financial aid office. The challenges of using this platform includes the fact that students lack the data necessary to access the different portals.

The scholarship eligibility criteria are as follows:

- South African citizen;
- Black students (as per revised B-BBEE codes);
- Studying towards the following streams at one of the partner HEIs:
    - Engineering (electrical, mining or energy);
    - Geology;
    - Corporate finance;
    - Finance;
    - Marketing;
    - Information technology; or
    - Education (specialising in mathematics and/or technology).
- 60% academic average; and
- In financial need (students who are part of the 'missing middle' and are not eligible for NSFAS support).

All deserving students are selected and those who do not qualify are encouraged to source other funding outside of the TF.

6.4.2 Selection process

The selection process is quite simple, and it is easy for the students to apply. The financial aid service provided by HEIs is largely responsible for this task, while the Scholarship Committee at TF is responsible for finalising the list that is sent by the HEIs. The students demonstrated an understanding of the selection process, indicating that it is based on academic performance as well as coming from a disadvantaged socio-economic background. They are also expected to submit a motivation letter about why they qualify for the programme. In addition to this, most students reported that, as much as they come from poor communities, they did not qualify for the NSFAS funding because they are classified as the missing middle, with a family income that is higher than the R350k NSFAS threshold, yet they still fall into the missing middle category as the R350k income threshold is insufficient family income to support a student at an institution with annual fees of approximately R85k to pursue their tertiary education.

While the Scholarship Committee does the final selection, it is worth noting that the participating HEIs undertake the first selection to ensure that only students who fulfil the criteria of the TF are pre-selected. A list of qualifying students is sent to the TF with details of income, results, etc. TF then selects the students based on academic performance and socio-economic status. The TF sends the approved list of selected students, with confirmation of total scholarship award, to the participating HEIs.

Databases are well maintained to ensure proper selection of financially needy students. TF requires supporting documents to ascertain whether a student fits in the financially need category. Supporting documents can include caregivers/parents' pay slips or an affidavit if the caregivers or the parents are not employed. The databases also allow TF to draw information on academic performance to ensure that academically deserving students are being supported.

6.4.3 Orientation

The HEIs indicated that they have general orientation programmes for all the students and the process is done in-house by the institution. At UKZN for instance, the South Africa Institute of Chartered Accountants (SAICA) participates in the orientation programmes, which has benefitted the accounting students. However, the institutions also mentioned that some donors have their own separate induction programmes. It is worth noting that TF does not have an orientation programme for their beneficiaries as the cohort is part of the institution’s orientation programme.

6.4.4 Contracting and grant agreements

TF sends out grant agreements to participating HEIs that the students can refer to and sign. The agreement stipulates payment cycles, how much is allocated for allowances, books and tuition, etc. In addition to these contractual agreements, TF has a contract with the recipient HEI that defines the relationship between TF and the institution and how the relationship is to be managed. Both contracts provide conditions for breach of contract, for instance a recipient's scholarship will be taken away if the recipient does not perform at 60% and above, while the institution's contract would be cancelled immediately if the money is misused or not used as set out in the grant agreement. The agreement, therefore, promotes accountability and lays out all the terms governing how the money is going to be used by all parties in the programme.

6.4.5 Scholarship allocation and management

TF determines how the funds for additional expenses should be released and managed. The participating HEI has, however, the responsibility to manage the process, including paying the students' allowances into their bank accounts. Each student allocation does not go beyond R100 000 annually. The relationship between TF and the student is guided by a legal agreement which stipulates the funding criteria and summary, breach of contract, termination procedure and responsibilities of both parties.

6.4.6 Reporting

The HEIs mentioned that they report to TF on an annual basis and write thank you letters to TF and other funders who fund students. On the other hand, the students report directly to the HEI about the impact the scholarship has had on their academic year. While the students can report at any time, one university mentioned that some students face difficulties throughout the year. As the assessment is done only at the end of the year, the need for additional support to some students is identified too late.

6.5 Impact

To date, **338** students have been supported/funded by the DEMSF programme, with a total of **R 24 705 593** spent since programme inception in 2016.

6.5.1 Scholarship reach data

The section below provides the scholarship programme reach data.

Table 21: Reach data disaggregated by institution

University Name	Year of joining the programme	# of students supported to date	Spent to date
STELLENBOSCH*	2015	1	376 464
IMPACT EMERGENCY*	2015	1	42 886
CJC	2016	4	208 265
SPU	2016	26	4 098 702
ACTIONBLIND	2016	37	147 957
UMP	2017	131	3 355 516
WITS	2017	13	1 850 534
UCT	2018	14	2 274 383
UJ	2019	23	2 148 353
UKZN	2019	12	794 407
RHODES*	2019	1	81 216
RICHFIELD	2019	1	138 093
Milpark Business School	2020	1	78 000
Richfield Graduate School*	2020	1	70 000
SPU	2016	26	4 368 702
UJ	2019	23	2 148 353
UP	2019	13	1 810 579
UWC	2021	10	713 183

University Name	Year of joining the programme	# of students supported to date	Spent to date
Total		**338**	**24 705 593**

***** HEIs that are not part of the DEMSF programme but are HEI partners on other TF projects. However, they have been included in this table as they are presented together with the scholarship programme data in monitoring reports.

6.5.2 What is the impact of the programme on end beneficiaries?

It is evident from the data collected from students, project administrators and key informants that the scholarship programme has had a positive impact on the lives of the end beneficiaries. All the project administrators from the three HEIs that completed the survey mentioned that the scholarship was making a positive impact on the lives of the beneficiaries. This finding was corroborated by data collected from FGDs and student surveys, where all respondents mentioned that the scholarship had benefitted them immensely as they are able to proceed with their studies without worrying about their tuition. However, one HEI mentioned that they were in their first year of participation in the scholarship programme, so they were yet to see the impact of the programme. The scholarship has eased the students' financial burden. They do not have to stress about their study finances and can concentrate on their studies knowing they have food to eat, textbooks to use to study and in some instances, a laptop to connect to internet with for online lectures, tests, etc. Students who had graduated and who attended the FGD mentioned that they were able to find jobs because of the scholarship since they had already graduated.

The HEIs also mentioned that they have been able to increase their success and access rates because of the funding received from TF, of which 2 of the 4 students received other funding from NSFAS and the other 2 students dropped out as a result of poor academic performance/personal reasons. This low dropout rate is because the students were able to progress to graduation since their tuition is guaranteed once they have been selected to be part of the scholarship programme. It was also found that in cases where a student drops out happens, this is mainly because of illness and/or other personal reasons, i.e., securing other funding, poor academic performance, etc. that are not linked to financial stress.

> *It really provides them with peace of mind and the ability to focus on actual academic work. This also gives them a sense of hope to actually graduate without having to worry about fee debt.* ***UKZN***

In addition, once part of TF programme, students know that they need to continue working throughout their studies in order to continue receiving the TF scholarship. This approach has helped to ensure that students excel because they do not want to lose the scholarship.

The effects of Covid-19 have been felt on a global level and the tertiary sector has also been affected. Covid-19 has left many breadwinners without jobs and some people who were breadwinners in their families have also lost their lives. The scholarship programme has ensured that students have access to funding despite the negative impact of Covid-19 and this has given them the peace of mind to continue with their studies. With the advent of a hybrid learning approach, students are still able to pursue their studies and follow their dreams, despite the adverse impact of Covid-19.

6.5.3 Scholarship adequacy to cover all expenses

In order to ascertain the impact of the programme, another important theme that was explored was to assess whether the funding that was received from the TF through the scholarship programme was sufficient to cover student needs from the students' perspectives. All the HEIs indicated that the scholarship funding was sufficient to cover costs of study, however, one HEI indicated that the set values of allowances was less than what the university offers for transport and meals.

Figure 25 below illustrates the responses received from the student surveys about whether the funding received was adequate to cover their expenses.

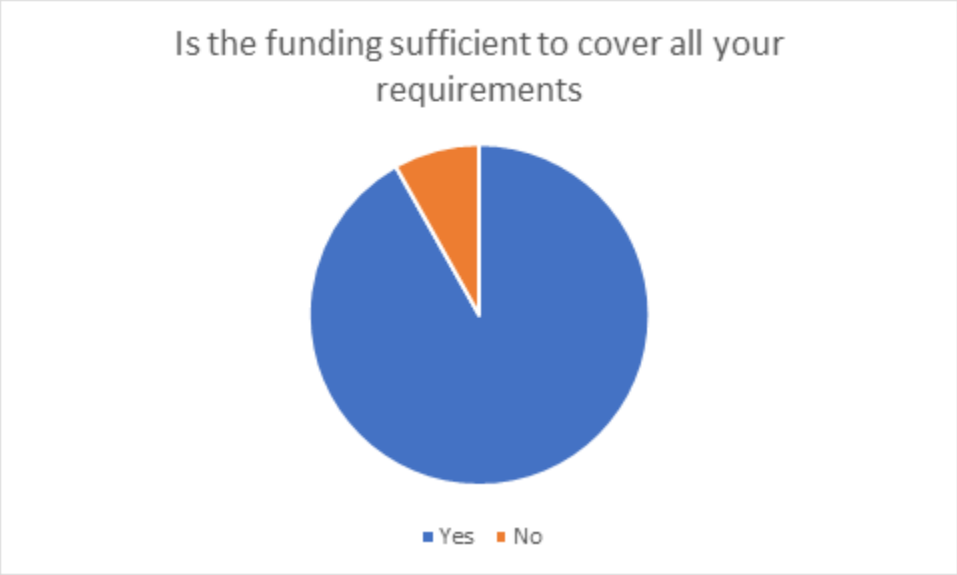


Figure 25: Is the funding sufficient to cover all your requirements?

Quantitative data collected from the surveys demonstrated that the funding available was, to a large extent, sufficient to cover student needs. This data was also triangulated with the FGDs, where all students mentioned that the funding was enough to cover their tuition and the HEI administrators all mentioned that funding was enough to cover the student needs. However, a key theme that emerged was in relation to the monthly allowance. It is worth noting that students indicated that their monthly allowance was not enough since it barely covered their monthly expenses and some even mentioned that they did not receive a monthly allowance.

> *I receive enough to cover my tuition and Accommodation but not my allowance.* ***Wits University Student***

> *Yes, for studies it is fine. I feel like the meal allowance could be a bit higher.* ***UMP Student***
>
> *But I wish the living allowance was a bit more than it is currently. Currently we get R1 500 as food and living allowance, but the majority goes to food because it is expensive.* ***Wits University Student***

> *The amount for food could be improved, R1 500 is simply not enough to cover food and cosmetics expenses for the month.* ***SPU Student***

One student also indicated that funding was not enough in previous years and had to pay their tuition on their own.

> *Yes [tuition funding is sufficient]. But the previous years it was not, and I have accumulated a small amount of money that I will need to pay by myself.* ***Student (university name not provided)***

Another student mentioned that, while the grant contract indicates what the scholarships covers, funds were not paid according to what was in the agreement and no reasons were given to them as to why it was not paid.

> *This was stated on the agreement form, but I haven't received my monthly allowances as well as the book allowance.* ***SPU Student***

A respondent from an FGD mentioned that, since their allowance was not enough, they had to look for other opportunities in order to pay for their meals because they were not sufficiently funded. All the students who mentioned that their funding was insufficient to cover all their requirements also indicated they did not have other sources of funding or income to make up the difference.

The issue about inadequacy of the allowance was also raised by the project administrators and corroborated by the findings from the students.

> *Students often require allowances that are benchmarked with national standards. Since Thebe does not provide these, students may decline the bursary funding.* ***UCT student finance personnel***

6.5.4 Provision of psychosocial support through universities

The provision of psychosocial support through centres for student support services at HEIs was beneficial for students' mental health and psychosocial needs. The HEIs mentioned that they had centres for student support services responsible for the provision of psychosocial support relating to personal issues that affected academic performance, such as illness, trauma and grief, while the school academic counsellor provided support services to students with poor and declining academic performance. These units are responsible for students' emotional wellness. Additional services provided by the HEIs include offering a helpdesk for gender-based violence and sexual assault, work-readiness programmes, career guidance, student mentoring and counselling services. One institution mentioned that they refer students to other service providers when they are unable to respond to all the student needs. These services are reviewed annually to check and ensure relevance. Furthermore, all support mechanisms have evolved tremendously with the pandemic. These have now been tailored to be offered online, were students book sessions with respective professionals.

According to the students who participated in the FGDs, these interventions are useful, especially when it comes to dealing with mental health issues related to Covid-19, support with preparing for the world of work and in other areas. To add a layer of quality, HEI project administrators mentioned that students provide input into this process by completing surveys about what can be done to improve the support services. However, it is important to note that the three HEI project administrators and the students mentioned that, while these services are available on campus, there is a high demand for them because of the large number of students requiring these services.

6.5.5 Recommending the programme to their friends

Another theme that demonstrates the impact of the programme is exploring whether the beneficiaries would recommend the scholarship programme to the friends. When asked if they could recommend the scholarship programme to their friends, all respondents said that they would. The major reason cited for why they would recommend the programme to their friends is that it helped them with their student fees, so they did not have to worry about paying off loans. The

programme also afforded them peace of mind and time to focus on their studies. The programme also covered their basic requirements, like books, accommodation and meals.

> *It is the best bursary programme among all bursaries I was offered throughout my studies.* ***SPU Student***

> *I would recommend a friend to apply for the Dr Enos Mabuza Bursary Programme especially those who are academically worthy but unable to proceed to higher education because they find themselves in a position where they are financially disadvantaged. The programme also encourages one to be more giving and offers a lot more than just a paid tuition, there is much support given off the programme that is very helpful.* ***UMP Student***

Another recurring theme that came up was that the students were not required to pay back any money after graduating, but rather they had to be involved community programmes during their studies in order to give back to their communities. Another reason mentioned why they would recommend the programme to their friends was that the programme targeted the 'missing middle' usually missed by NSFAS and other funders, thus playing a critical role.

A further reason mentioned was that the application process was simplified, so it was easy for them to apply and submit all the supporting documents required. Another recurring theme was the TF kept in contact with the students who had graduated to ascertain whether they had found jobs or whether there were issues that they were struggling with and needed support in.

The five students who attended the FGDs of students who had graduated and found employment commented on the programme by mentioning that they were able to look after their families. Findings from document reviews indicated that eight of the 20 beneficiaries who graduated in 2019 had been able to find employment/internship programmes. Overall, 40.9% (18 out of 44) of graduates from the scholarship programme are employed. In other words, approximately 60% are unemployed, which is alarmingly higher than the national graduate unemployment rate of 11% (QLFS, Q2:2022). It also needs to be noted that TF's unemployment rate is significantly higher when compared to similar small-scale scholarship programmes, which have employment rates of between 5% and 7% (as per Table 12 below).

6.5.6 What elements of the Dr Enos Mabuza Scholarship Fund programme made it successful?

The programme consultant made the scholarship programme successful to a large extent. This is reflected by all 49 (100%) participants in the electronic survey who mentioned that the support received from the programme consultant was beyond financial and it helped them mentally, giving

them the support they needed to complete their studies. The programme consultant provides mentoring, coaching and support to all the students in the programme. This kind of support is required by the students as they need to be given support throughout their studies.

> *The program provides support for more than just Finance. They care about my mental health, my academic progress and personal life. Which makes the whole program more than just a bursary.* ***Student (university name not supplied)***

> *Yes, because we have a father in [the programme consultant] who is very supportive in all manners of our lives beyond academics and the bursary programme provides for all our needs on time to enable us to focus on our academics.* ***UJ Student***

6.5.6.1 Provision of holistic funding

The literature review provided insights into why alleviating financial stress is important when setting students up for success as they can now focus on their academics instead of worrying about where their next meal will come from, how they will buy their textbooks and where will they live. Further support from the quantitative findings highlighted this when comparing the success of students in similar programmes. By providing sufficient financial support, severe financial stress can be removed from the students so that they can focus on their studies, have a better vision of the future and help others.

6.5.6.2 Clear selection criteria

Interviews are a critical part of the preselection and selection process which significantly improves the likelihood of selecting the right kind of student for the programme. TF can work closely with NGO partners and schools to identify and select the right students from early on who are studying relevant scarce skills at school (e.g., maths, science, etc.). TF needs to map out clearer selection criteria with regards to the definition of 'poor backgrounds' (i.e., maximum family income bracket threshold, as well as specific qualifications so it is not a blanket 'scarce skill' qualification). In this way, the selection process could be improved to identify the students who are more likely to do well in the scarce skills subjects.

6.5.7 What is the extent to which the strategy met its objectives?

The programme has generally met its overall strategy objectives as has provided access to students coming from poor communities, thus increasing their chances of being successful in their career pursuits. The evaluation found that the way to further strengthen the strategy outcomes and increase the programme's ROI is to find greater efficiency in certain processes of the programme,

and to improve quality by strengthening the holistic wrap-around support provided to the students. Furthermore, technology can be used more innovatively to increase communication and manage various aspects of the programme (e.g., recruitment, record keeping, student check-in reporting, the tracking and monitoring of students and graduates and management tool to increase efficiency and data management). TF should increase the low-cost aspects of the programme, particularly activities where students support each other through study groups, exam preparation sessions and alumni involvement with job networking opportunities for the students.

6.5.8 Have the beneficiaries been set up for success?

The scholarship programme can do more to support the students so that they graduate on time and find employment or venture into entrepreneurship. A key measure of effectiveness of scholarship programmes is the throughput rate, dropout and graduation-on-time rates of students. One finding that indicates the effectiveness of the programme is that eighteen out of forty-four graduates in the entire programme since inception have been able to find employment/internship programmes. This is low compared to national and similar small-scale scholarship programme statistics. A 2019 study done by DHET researched the 2010 throughput rate of funded (NSFAS, DHET, Thuthuka) student cohorts of 2000 to 2018. Throughput measures the proportion of students who successfully complete their qualification within the set official period of the qualification. The researched found the throughput of this cohort to be 76%, which is fractionally higher than DEMSP's throughput rate of 71%.

6.5.9 What lessons for scaling and replicability can we learn?

The section below details the lessons that were learned from the implementation of the DEMSF programme. These lessons are key for better programme structure for implementation, scalability and replication.

6.5.9.1 Administration

Delayed recruitment and selection:

It is evident from the findings that early selection of the beneficiaries is crucial in order to avoid late and delayed payments, students having to make do with a lack of academic support material and having access to meals and psychosocial support.

Delayed disbursements:

The allocation and disbursement process needs a solid structure, where students have direct access to enquire about their allowance allocations as well as having them paid on time.

6.5.9.2 Programme support

Lack of work-readiness support

With the lack of a work-readiness programme, students feel the gap as it impacts on their successful transition from studies to the world of work. A work-readiness support programme would help them greatly in terms of supporting them to access and secure employment.

Laptop allowance

Since most HEIs having gone online, it is imperative for the students to have access to laptops. Laptops are important for students pursuing certain qualifications that require higher specification laptops. Access to such laptops would support these students, helping them to be successful in their studies. This allowance should be separate to the book allowance.

6.6 Relevance

6.6.1 How relevant is the programme to Thebe Foundation's strategic initiatives?

The programme aligns well with the TF's main strategic objective of contributing to the development of higher education graduates who are confident and proud of their African identity and heritage, since it has produced 44 graduates since inception. From the qualitative findings, one can easily pick up on the pride the participants had in belonging, to not only the programme, but to South African society as a whole when they speak about the work they are doing in their communities and the future aspirations they have to make a difference on the African continent and the world, as they pursue their future careers, making TF proud.

> *I worked with a local community-based organisation doing work with orphans and vulnerable children in my community as part of fulfilling my bursary requirements and has allowed me to be responsible and give back to my community.* ***SPU Student***

> *They required me to do voluntary work as part of the Scholarship programme so during my free time I have been doing voluntary work.* ***UWC Student***

6.6.2 How relevant is the strategy in light of the tertiary education needs?

With the funding crisis in the education sector, the programme's strategy to provide a holistic funding approach as a solution speaks volumes about bringing the private sector in to partner and

assist government to tackle and solve this crisis. More students can now access higher education and the stand a better chance of being successful and contributing back to society when they become economically active.

6.6.3 What is the extent to which the programme responded to beneficiary needs?

The programme is designed and developed to address the general challenges of students who otherwise would not be able to access higher education. The evaluation will aid, assist and help inform the future strategy of the programme with respect to the exact needs of the beneficiaries in order to find strategic solutions for responding directly to them. The future strategy should involve a more targeted approach as the programme has now heard the students' and alumni direct voices about how to develop the strategy further.

6.7 Effectiveness

6.7.1 What has the programme achieved to date?

The programme has reached 338 students to date, 321 for DEMSF.

Table 22: Scholarship programme statistics

Year of Study	2016	2017	2018	2019	2020	2021	
	Actual	Actual	Actual	Actual	Actual	Projection	Total
Bursaries awarded	3	153	34	50	25	56	321
Bursary holders graduated	N/A**	N/A**	15	20	9	20	64
Bursaries withdrawn/discontinued	0	0	1	4	4	2	11
Graduates employed	N/A	N/A	5	13	0	10	28
TIC Skills Bursary Amount	N/A	N/A	N/A	N/A	2 594 959	4 638 415	7 233 374

** No graduations as the first cohort of students were still studying, graduation only started in 2018.

Table 22 and Table 23 give an overview of the programme's reach and impact as well as a full-view comparison with similar small-scale scholarships and government bursaries. Table 21 shows

the number of students who have been funded through the DEMSF programme while Table 23 shows the number of students funded under the DEMSF, hence the variations in the numbers. An overview of the financial commitment is illustrated in Table 22; however, we do not have a view of spend amounts per institution per year and this data is provided from the year the HEI joined the programme. Recording and maintaining data is a key element of the successful evaluation of the programme. It is crucially important to be able to measure throughput, dropout rates, graduation-on-time rates, employment rates and amount spent per university per year on the programme to be able to genuinely measure its effectiveness and overall strategy.

Table 23: Programme milestone achievements compared to similar programmes

	Dr Enos Mabuza Scholarship Fund	Moshal Scholarship Program*	Dell Young Leaders*	NSFAS*
Dropout rate	< 2%	< 5%	< 5%	65% (over 5-year period)
Graduation rate	98%	93%	Not known	25.5% (of total national graduates, 2015)
Employment rate	49%	93%	98%	Not known
Support	Financial, Academic and Partial Psychosocial	Full Financial, Academic, Psychosocial and Career Support	Full Financial, Academic, Psychosocial and Career Support	Financial Only

*Data accessed from publicly available information

Other achievements include the scholarship programme producing 44 graduates. However, the programme data does not include:

- Time taken to secure employment; and
- Alumni data tracking (i.e., updated employment status for those that were unemployed, salary bands, etc.)

The above table comparison provides insights into how important holistic wrap-around support is to set students up for success, as highlighted in the literature review. The two programmes with

full wrap-around support have higher graduation and employment rates compared to TF and NSFAS, programmes that have partial or no wrap-around support.

6.7.2 What are the successes of the programme?

There have been notable successes of the programme, as outlined below.

6.7.2.1 Improving access and success

The DEMSF programme has, to an extent, successfully put in place and implemented initiatives that positively impact bursary holders. This relates to both financial and non-financial support. The programme consultant provides psychosocial support to the students. What stands out as a gap from the students' performance information is the lack of soft-skills development, which could be one of the reasons behind scholars who do not perform well and/or fail to secure employment.

From the data provided by TF, as well as from the FGDs, it is evident that the programme has positively impacted the lives of the students and graduates. The financial support has lifted a huge burden from the students in terms of accessing tertiary education and being provided with psychosocial support by the programme consultant.

Overall, 40,9% (18 out of 44) of graduates from the scholarship programme are employed (60% are unemployed), which is slightly lower than the average national unemployed rate for youth of 64,4% (QLFS, Q2:2022) but quite high compared to the national graduate unemployment rate of 11%. It should also be noted that the unemployment rate is drastically higher compared to similar scholarship programmes, as per Table 20.

6.7.2.2 Motivation to keep excelling and complete studies

It was also noted that the scholarship programme provided the students an opportunity to keep excelling and complete their studies. Getting awarded a TF bursary was a great opportunity that the students did not want to misuse as i) they saw how other students who did not have a bursary dropped out of tertiary education; and ii) the requirements of performing at an above 60% average mark pushed them to excel because they knew that they needed to surpass that threshold to remain in the system.

The scholarship assisted the students to view their previous semester results as they proceeded with their studies because their tuition was paid in full. This key finding was a recurring theme and was mentioned by students in the FGD as well as in the survey. HEIs do not release results to students who owe fees from the previous year. The students funded through TF did not encounter

challenges accessing their previous semester results because their tuition was paid in full, thus allowing them to continue their studies knowing how they performed in the previous semester. This information is critical because students need to know whether there are some courses that they need to repeat or supplement.

6.7.2.3 Provision of support

One key theme, which is regarded as the key highlight of the impact of the programme, is the provision of support. The students mentioned that the support they received from the programme consultant, who is a 'father figure' in the programme, was enormous and assisted them with personal challenges they faced. In addition, this support was also extended to the students who had graduated from the programme because the programme consultant kept in touch with them to establish whether they had found jobs and also to assist them with personal challenges, if they were experiencing any. The consultant provides psychosocial support to the students, where they have built a safe and trusting environment.

6.7.2.4 Students not required to pay back the scholarship after graduation

Another finding from the evaluation was that TF did not require students to pay back the scholarship after they had graduated. However, students were expected to partake in programmes to 'plough' back to their communities. The students found this approach beneficial because they were not burdened with the pressure of needing to pay back a loan, but rather they could focus their efforts on community work, thus responding to what their communities needed. Some of the community work that the students mentioned involved working with NGOs in their communities, from helping the NGOs draft a budget to helping with a vegetable garden, etc. Some of the students have gone back to volunteer at their former high schools to assist learners to apply to university and to talk about their own personal journeys.

6.7.3 What are the constraints of the programme?

The challenges that are discussed in this section were recurring themes that were analysed from the data collected from the students.

6.7.3.1 Sharing the allowance with family

A challenge that was identified from the evaluation was that more than half (55%) of the students mentioned that they shared their allowance with family members back home. This is understood in the context that the students who are funded by this programme are from poor communities with

poor families. This could also be the reason why it was found that the allowance was not adequate to cover the students' monthly expenses.

6.7.3.2 Lack of provision of laptops

The students are mostly studying online, which requires them to have access to devices for their curriculum. It is a huge challenge for students not to have a laptop allowance and still be expected to perform well in their studies. This posed a challenge as students could not submit assignments or follow their academic curriculum.

> *I would like if Thebe would offer us a laptop budget because as a postgraduate, I need a good stable laptop for research and other school-related duties.* ***UCT Student***

> *I dislike the fact that they do not have an allocated budget for the purchasing of electronic devices, a laptop, and the life of a student is exceedingly difficult without a laptop… We need money to carry out our projects smoothly.* ***UKZN Student***

6.7.3.3 Disbursements and delayed approvals

The disbursement process takes too long as a result of TF paying funds over to the HEI and then the HEI paying Fundi Capital to disburse the allowances. The students need to keep going to their financial aid offices for allowance queries, delays, etc. TF does not stipulate the exact breakdown of the students' approved scholarship amount, which adds to the queries and misallocations. This breakdown needs to be added to the students' contracts and also communicated to the student when the allowances are disbursed.

> *They let the University take care of how much money to disperse to students. They do not have specific rates/fee breakdown to allowances.* ***Student (university name not provided)***

> *They should give the student the money instead the institution especially post graduate students.* ***UMP Student***

> *The bursary programme only covers off-campus accommodation to the amount that on-campus accommodations charge every month, which means that our parents have to top up that amount as off-campus accommodation is much more expensive.* ***UWC Student***

Another challenge that was identified by the students was that the approvals for the grant took too long. This meant delays in getting access to basics, like books for studying and allowances for meals.

Every time I require allowance, I need to contact the Wits financial aid and they take at least a week to send me my allowance and it is frustrating that I always do not receive my allowance in time… Making the university the middleman between students and Thebe with regards to funding. It is incredibly tedious and there are huge delays with receiving funding. I have to email a number of people from the university to receive funding, which emails sometimes go ignored. Thebe should interact with students directly to avoid this. ***Wits Student***

6.7.3.4 Fewer interactions with fellow beneficiaries

Another challenge that came up in the findings was that students did not know each other; thus, they did not develop a supportive community where they could help each other. Because the beneficiaries did not know each other, networking among the students as a group was limited, as was networking with the alumni, where the alumni could help the students find work opportunities.

The less interaction we have with our fellow bursary holders [is a problem]. ***UCT Student***

Start a group of TF students within a university as a form to provide support for one another. ***UWC Student***

6.7.3.5 Lack of internship opportunities

As much as this is a scholarship, the lack of work opportunities within TF came up often. TF offers internships and other job opportunities, yet the programme recipients are not made aware of these opportunities.

There isn't any internship programme to guarantee you a job when you graduate. ***UCT Student***

If possible, offer employment for students, even if it's just for six months. ***UMP Student***

More networking between companies under the Thebe Investment Corporation for possible job opportunities [would be useful]. ***UMP Student***

6.7.3.6 Administrative constraints

HEIs select from their databases students who might already be funded by other programmes. When they identify this challenge, administrators need to redo the entire process again, thus resulting in a lot of administration. In some cases, the students who missed the advertisement to apply are missed in the selection process, although they may be deserving.

Another administrative challenge experienced by the HEIs comes from the fact that their financial aid departments must pay and deal with service providers, for instance those that offer study material. To reduce the amount of administrative work that needs to be undertaken, the HEIs recommend that TF should manage the book payment process directly and not give that task to the HEIs.

6.7.3.7 Overallocation of student funding and double-dipping

Another challenge that was identified with the scholarship programme was overallocation of funding for tuition and accommodation, resulting in excess amounts being paid on the student fees. It has been problematic because students have been trying to claim the excessive amounts allocated to them. Another challenge that was identified is double-dipping, where a student is funded by two funders. Overallocation of student funding can be solved by ensuring that TF pays the HEI the correct allocation as stated on the student fee account sent to them, while the double-dipping challenge should be solved by the HEIs by ensuring that they have systems and controls in place to ensure that students do not receive funding from more than one funder.

6.7.3.8 Late advertisement

Students are currently recruited and only become part of the programme half-way through the year, meaning that i) some students would have eventually gone with another scholarship; and ii) students would have had no means of support for an entire half of the year (e.g., no access to meals, textbooks and wrap-around support). This impacts on the academic and psychosocial wellbeing of the students and, thus, has negative impact on the programme's objectives of supporting students in order for them to be successful in their studies and future careers.

> *If the TF could do the allocations early in the year and give us the confirmation letters to clear the students funded. It must also clearly indicate what it covers e.g., tuition, residence, book and meal amount to be paid directly to students to avoid delays. We encourage TFs to please pay allowances directly into students' personal bank accounts.* ***UKZN Project Administrator***

> *TF can improve by sending the bursary advert in time so that students have enough time to submit applications. It is also noted that TF has taken a decision to continue to process their own bursary applications, therefore request that funding decisions and approvals are made very early in the year after confirmation of registration so that students may receive their allowances at the beginning of academic year.* ***UCT Project Administrator***

6.7.3.9 Data storage systems

One HEI mentioned that their student database is in Microsoft Excel format and is, hence, prone to changes by anyone, making it difficult for the administrators to track changes or to see who made the changes. Once approved, the database of the students under TF should be stored more carefully to allow the administrators to ensure that data is locked and not tampered with.

6.8 Efficiency

6.8.1 What is the cost effectiveness of the Dr Enos Mabuza Scholarship Fund programme?

The scholarship is structured in a cost-effective manner. Much of it is administered through the HEIs' financial aid offices, The programme is largely managed by one consultant and there is limited use of addition service providers. However, cost effectiveness may be leading to a sacrifice of programme outcomes. For example, only 49% of graduates found jobs after studies compared to similar programmes that have higher success rates of <90%. These limitations have posed challenges to the structure and operation of the programme, such type of support provided to the students, which ends up influencing the success potential, i.e., employment after graduating, etc. of the students, as can be seen in Table **22** and Table 23above. Part of the cost effectiveness of the programme indirectly affects the programme's overall success, seeing that the programme is not performing as well as similar programmes are, i.e., lower throughput and, graduation rates, high graduate unemployment rate that is alarmingly higher than the national rate, as a possible result of no work-readiness support and limitations to funding provided as compared to similar programmes providing the career-readiness support and uncapped full funding.

Table 24: Scholarship programmes' comparison

	Dr Enos Mabuza Scholarship Fund	**Moshal Scholarship Program**	**Dell Young Leaders**	**NSFAS**
Scholarship type	Full scholarship, R100k maximum	Full scholarship	Full scholarship	Full bursary
Academic support	Yes	Yes	Yes	No

	Dr Enos Mabuza Scholarship Fund	Moshal Scholarship Program	Dell Young Leaders	NSFAS
Psychosocial support	Partial (Programme Consultant - Joel)	Yes (In-house)	Yes (HEI partners)	No
Career-readiness support	No	Yes	Yes	No

6.8.2 Did TF use its resources efficiently?

TF has not fully utilised its non-financial resources since the TF company group can extend the learning and development/human capital teams to the programme to assist in building and developing the students' soft skills and work-readiness skills. This could also be further extended to offer work opportunities within the group, which is further addressed in the recommendations section below.

With respect to financial resources, the programme efficiently supports the students financially, but it is recommended that TF performs a benchmarking exercise to verify that allowance breakdown limits are aligned to similar programmes.

6.8.3 What lessons can be learned from the efficient or inefficient use of resources?

Since this programme only started in 2016, there is an opportunity to strengthen its strategy. The lessons learned from both the quantitative and qualitative findings will assist in restructuring the programme so that it aligns to the strategy and provides the outcomes and key indicators of a successful programme. The approach of partnering with the HEIs to manage the programme is a cost-effective approach because it saves the finances of the programme. This does, however, come at an operational cost as allowance payments and allocations are sometimes delayed, as earlier mentioned in the qualitative findings.

In regard to human resources, the programme has efficiently maximised the use of current personnel. The partnership between TF and participating HEIs has allowed universities to manage the selection processes of students with no additional pressure on TF itself. In addition, decision-making about student selection is not dependent on one individual but on a selection, committee using a predetermined selection criteria.

While the current human resources have managed the scholarship programme fairly well, additional support is required on the monitoring and evaluation responsibilities of the programme. Having better data about the programme will enable the TF to manage impact and track year-on-year progress much more effectively. Ultimately, this will make analysis of efficient use of resources easier as well.

6.9 Sustainability

6.9.1 Are the outcomes of the programme sustainable beyond the programme period?

In order to realise the sustainability of the outcomes, as well as increase the capability of measuring programme efficiency, effectiveness, impact and relevance, the monitoring and evaluation tools of the programme need to be strengthened in order to collect quantifiable data that can illustrate the key strategic deliverables of the programme.

Another important point relates to the programme consultant. Although the evaluation has found almost universal praise for his work and support of the students, there is a substantial risk in terms of dependency on his role. If the programme consultant should no longer be able to perform his role on the programme, TF would face a substantial challenge in replacing this support. This has direct implications for the overall sustainability of the programme.

With more students gaining access to tertiary education and graduating to finding employment post their studies, despite being as low as it is for TF graduates at 49%, it is encouraging to note that it can be improved upon as it addresses the NEET agenda, as per the 2030 NDP goals, and provides a solution to the challenged faced by NEET students referred to in the literature review.

7. Recommendations

The section proposes recommendations that can be used to strengthen the programme, based on the evaluation findings. Implementing these recommendations will add value to the programme and strengthen service provision to the strategic arms of the programme.

7.1 Literacy and Numeracy programme

7.1.1 Strategic focus going forward

Tshikululu recommends the continuation of the teacher-focused approach that TF has been implementing as this has proved to be impactful on improving learner performance, in particular focusing on particular primary school phases and key transition grades. Tshikululu also recommends taking a systematic approach to strengthening TFs data collection, analysis and use for the Lit Num programme in order to effectively monitor and track the programme's performance. This should be accompanied by milestones that determine the point of entry and exit into schools.

TF should be guided by the principle that they cannot be all things to all people and should determine what kind of social investors they want to be in the literacy and numeracy sector, decisions need to be made about in which strategic focus areas will TF deploy its limited resources for the greatest impact. As TF moves forward with the programme, Tshikululu outlines the following three options that could be considered.

7.1.1.1 Option 1: Focus on Foundation Phase (Grade R to 3) including Grade 4

The ability to read for meaning and pleasure is arguably the most important skill that children learn in primary school. Since almost all future learning will depend on this fundamental understanding of the relationship between print and spoken language, it is unsurprising that literacy, built upon a firm foundation of basic reading, is used as one of the primary measures of school efficacy. Likewise introducing mathematics to children from an early age helps to develop their understanding of all elements of problem solving and reasoning in a broad range of contexts. Apart from the obvious cognitive importance of learning to read, children who become good readers are provided with opportunities to practice their developing numerical skills and knowledge, so they improve their competence and confidence in using them within the first three years of primary school, also have higher levels of socio-emotional wellbeing stemming from improved self-expression and communication as well as the self-confidence that comes from reading and numeracy.

Sadly, the opportunity for learning to read with fluency, accuracy and comprehension is one not afforded to the majority of South African children. Whether children are tested in their home language or in English, the conclusions are the same; the vast majority of South African children cannot read for meaning by the end of Grade 4 – even in their home language, while almost a third are still functionally illiterate in English by the end of Grade 6. In addition, poor grounding in numeracy learning at Foundation Phase level has a ripple effect in that one of the fundamental factors of poor learning outcomes in numeracy learning can inhibit further learning in mathematics. There has been a growing recognition of the importance of the early years for the acquisition of mathematical skills in South Africa. The realisation is that a strong foundation is needed if children are to be successful in learning mathematics at higher grades

By not acquiring basic reading and numeracy skills in the Foundation Phase learners are effectively 'silently excluded' from learning, since they struggle to engage with the curriculum in higher grades and fall further and further behind. While there are many challenges in the South African education system, the fact that most children do not learn to read fluently and use maths concepts to make sense of their world and connect these concepts with their environment and everyday activities with comprehension by the end of Grade 3 (in any language), is arguably the binding constraint to improved educational outcomes for the poor. Unless these learners can understand basic reading and writing and engage in meaningful literacy activities and acquire the proper foundational numeracy skills from an early age, they will be forever disadvantaged and in perpetual catch-up.

The transition from the Foundation Phase of early education to the Intermediate Phase can be challenging. Learners in Grade 4 have to adjust to learning in English as the main language of instruction (this transition also affects teachers as most them are not English first language speakers); adjust to an increased amount of homework of varying nature; become more attuned to subject-based learning; adjust to a more structured daily school routine; and become progressively accustomed to new learning experiences and assessment methods, including revision, dictation, tests, examinations, spelling and sentence writing.

Tshikululu recommends specifically focusing on Foundation Phase (Grades R to 3). including Grade 4. Teachers' influence on their learners at this early learning stage is immense, as learners continue to expand their skills as they progress through each grade. The advantages of focusing on this option include the fact that this development and growth impacts on how learners will view education throughout their life. Without these foundational skills, learners will face challenges later in life. It is within the Foundation Phase that learners start to grasp challenging concepts, and their teachers can identify and address any learning concerns. Focusing to Foundation Phase can prevent a gap in learning and future learning problems. Grade 4 encompasses the transition into the Intermediary Phase, where subject teaching is introduced with different teachers for each of

the six subjects offered. This transition poses several challenges to learners to which they must adapt. Having to change LoLT seems to be the most challenging aspect of this transition. Including Grade 4 as a strategic focus area could ensure the successful transition into the Intermediary Phase and track to see whether learners have acquired the foundational skills that will strengthen their literacy and numeracy skills in the future**.**

7.1.1.2 Option 2: Focusing on literacy and numeracy in critical years of schooling

When children enter Grade R, these learners are expected, amongst other things, to already be able to identify words, recognise words made up of sounds, segment oral sentences into individual words, recognise initial sounds, read high frequency word, answer question based on a story read, form letters using finger painting and copy words and letters. The transition for young children from early learning environments to formal schooling is one of the most important and influential transitions. Being ready for formal schooling is seen as an important contributing factor that affects enrolment, attendance and completion rates. Stats SA (2019) released a general household survey revealing that 63% of children do not attend a day care centre, crèche, early childhood development centre, nursery school or pre-primary school to focus on school readiness. Often children are seen to struggle in later grades because their early learning skills were not sufficiently developed when they started school, and research strongly supports the importance of early play and 'preschool' learning and ensuring that children at Grade R have acquired the necessary literacy and numeracy skills for Grade 1. School readiness is dependent on children's skills and characteristics, parental involvement, good teaching skills, good school policies and good educational structures and activities. It is important to address any gaps that hinder school readiness in order to ensure a smooth transition into Grade 1.

During the foundational phase of learning, learners are encouraged to be creative, and to discover and explore through playing and learning. This is when reading, writing and numeracy are taught. By Grade 3 learners become problem solvers, gain confidence, learn how to collaborate and where they can find the joy in learning. Foundational literacy and numeracy skills are the building blocks to other skills. They give children the foundations (hence the term 'foundational literacy and numeracy') to access higher-order skills and other parts of the curriculum. They put children on a steeper learning trajectory. So, not only do they unlock higher-order skills, but they allow children who master them early to get more out of each year of school. Having these skills means children can keep up in class, which helps them stay in school for longer. During the Foundation Phase, learners start to grasp challenging concepts and their teachers can identify and address any learning concerns. Addressing these gaps by the end of Foundation Phase (Grade 3) before entering into Intermediary Phase can prevent a gap in learning and future learning problems.

The Intermediary Phase is about using foundational concepts to build knowledge and learn new concepts. A child with strong foundational skills is more likely to succeed in this phase and to develop a sense of independent learning. The PIRLS of 2016 and the TIMSS of 2019 provided internationally respected measures of learning trends over time and these studies indicated that large proportions of South African learners reach Grade 4 without having learned to read for meaning and Grade 5 without achieving basic numeracy proficiency. These outcomes at Grades 4 and 5 are a reflection of the quality challenges that persist in the Foundation and Intermediate phases. It is important to close the learning gap in Grade 6 to ensure a smooth transition into the Senior Phase.

A second option would be for TF to specifically focus only on Grade R, Grade 3 and Grade 6. The focus of the catch-up programmes is to close the literacy and numeracy content gaps at the end of ECD (Grade R), Foundation Phase (Grade 3) and Intermediary Phase (Grade 6) to ensure that learners are able transit to each phase having acquired the proper foundational skills of the previous phase. The advantages of this in Grade R is that it would ensure that children have acquired a proper learning foundation and are school ready. At Grade 3 the advantage would be to ensure that children have acquired foundation skills in literacy and numeracy to be able to move to Intermediary Phase. For Grade 6, the advantage would be to ensure that learners have acquired the proper intermediary skills to be able to enter the Senior Phase. As mentioned in the literature review, teachers, especially in schools located in rural areas, face serious challenges when preparing 21st century learners, as well as closing content gaps for some learners who are still behind in preparation for the next transitionary phases. Teachers lack proper training on new teaching strategies. Covid-19 has also contributed to the challenge experienced by the teachers in dealing with the transitioning learners as a result of the introduction of virtual/online teaching.

MCIS cumulative gaps model as well as RET's blended approach already focus on addressing content gaps. The common theme that came out of the KIIs with the principals was the importance of addressing content gaps to ensure that learners are ready for the next phase, learners progress from Grade R to Grade 1 not school ready, as well as from the Foundation to the Intermediary Phase, without acquiring solid foundation skills and, hence, are unable to catch up.

> *The programmes should focus on Grade R for shaping learners and preparing them for school, Grade 4 for supporting learners with any curriculum gaps in Foundation Phase, and Grade 6 to preparing learners for the higher phase grades.* ***School principal***

The main disadvantage of using this approach is that not all learner content gaps might be picked up fast enough for learners to be ready for the next transitory phase, so learners might run the risk of having cumulative content gaps as they enter new transitory phases. Lastly, slow learners who

require more time and attention might not benefit from catch-up programmes, they would require constant support each grade.

7.1.1.3 Whole-school development approach (Grades R to 7)

The dire state of basic education in South Africa is undeniable. Since the start of South Africa's participation in international testing in 1995, the country has become accustomed to the reality that South African children are consistently ranked last or near to last in international tests of reading literacy and numeracy (Howie *et al.*, 2017; Reddy *et al.*, 2016; Zimmerman *et al.*, 2012). The most recent 2016 PIRLS results indicate that 78% of children cannot read for meaning (Howie *et al.*, 2017). In this context, it is useful to ask whether there are exceptions to the norm; schools serving the poor that produce at least adequate levels of learning. The presence of more functional primary schools can provide 'best practice' examples from which policymakers, district and school managers and teachers may learn from and emulate these in underperforming schools. Significant dropouts that occur at higher grades and weeding out of underperformers in schools, makes these apparent outlier secondary schools much easier to identify at primary school level. The largest proportion of South Africans are schooled in no-fee schools and continued system improvements requires improving the quality of education in primary schools

A body of evidence is growing on how accessing a quality school, particularly in the primary phase, matters for life trajectories and labour market equalities in South Africa. Studies by Shepherd (2017), Von Fintel (2015), Von Fintel and Van Der Berg (2017) and Kotze (2017) using different sets of nationally representative data, identify school quality effects equivalent to about one additional year of learning. Von Fintel (2015), for example, using the National School Effectiveness Study (2007–2009) data finds that black learners who attended former white schools were ahead of their peers in black schools by almost a year, but school quality effects are greater in lower grades. More recent research, based on tracking children across schools in the Western Cape, finds similarly large effects of attending a better performing school (Von Fintel and Van Der Berg, 2017). But school quality does not just matter for success on tests, school completion rates and university acceptance. Higher levels of skills obtained through access to better quality schools are important for social mobility and are rewarded in the labour market (Burger and Teal, 2016; Moses *et al.*, 2017; Zoch, 2016).

Based on this reasoning another possibility is for TF to focus on Grade R to Grade 7 and taking a whole-school development approach. A whole-school development approach is geared to strengthen the overall functionality of schools and improve the mechanisms for delivering education in the classroom, as well as in the broader school environment. This can be done by tracking and monitoring learner performance at each grade in order to pick up on and address any content gaps.

This also includes tracking and monitoring teacher performance and ensuring teachers are adhering to their ATP. Ensuring the SMTs and HODs are equipped with enough knowledge to be able to effectively monitor and induct the Lit Num programme to teachers and ensuring that parents are actively involved in schools. The advantage of focusing on Grades R to 7 will enable TF to effectively track and monitor learner performance, as well as identify any content gaps at each grade, ensuring the successful transition from Foundation and Intersen phases.

Although this approach is ideal, it is an expensive approach that would require TF to direct more funding towards the Lit Num programme and, potentially, fundraise for additional funding. It would also represent a substantial shift in strategy for TF, which may require new skills and capabilities.

7.1.2 Recommended approach - Option 1

Using the teacher-focused approach, Tshikululu recommends option 1 (focusing on Grades R to 3 including Grade 4). The findings from the quantitative data show that the Grade R overall performance was much higher in comparison to the Intersen Phase. The Grade R learners were able to improve their performance significantly. Investing financial resources in the Foundation Phase is critical in order to ensure that children have developed appropriate literacy and numeracy skills. It is important that learners acquire the proper foundational skills early so that they do not fall behind. Using this approach would ensure that no young child is left behind and that learners are able to proceed through primary schooling with no content gaps.

The data analysis further demonstrates evidence that there is higher return in investing in Foundation Phase as opposed to investing in the Intersen Phase, where it might be too late to pick up on content gaps. Focusing on literacy and numeracy content gaps programmes (option 2) might not have a meaningful impact; there could be some improvement but could be too late for some learners to pick up on all the content gaps. As indicated by the quantitative data, TF's focus on the Intermediary Phase for literacy and numeracy shows that, while learner performance showed an increase, a great deal needs to be done in order to push learner average scores to above 50%. TF's intermediary learner performance results further reiterate the importance of learners acquiring the foundational skills in order to avoid content gaps in the Intermediary Phase. Although the whole-school development approach (option 3) would be ideal, this requires a great deal of funding that may not be available to TF on a meaningful scale. TF should rather deploy its limited resources to make greatest impact.

Grade 4 encompasses the transition into the Intermediary Phase, where subject teaching is introduced with different teachers for each of the six subjects offered. This transition poses several challenges to learners to which they must adapt and needs to be carefully managed and monitored. Having to change LoLT seems to be the most challenging aspect of this transition. Including Grade

4 as a strategic focus area could ensure the successful transition into the Intermediary Phase and track to see whether learners have acquired the foundational skills that will strengthen their literacy and numeracy skills in the future.

7.1.2.1 Programme implementation approach

Once TF has continued on and adopted its teacher-focused approach and has identified its strategic focus area, improved, impactful learner performance will be ensured. TF will then strengthen collection and analysis of learner and teacher performance data. Tshikululu recommends that TF strengthens the sustainability of the programme, increase parental involvement in schools and replicate the programme in other schools. Only once the proposed implementation approach has been adopted and tested in other schools, and there is a proof of concept, can then TF consider scaling the programme. The following should be taken into consideration.

7.1.2.2 Strengthening the sustainability of the programme

Strengthening school systems to be able to deliver quality learning is critical because it not only impacts current learners but future learning. This can be done by ensuring that the school leadership structure (SMTs and HODs) has a good understanding of the programme and are highly capacitated, well trained and know how to monitor the literacy and numeracy programmes. Although previous HOD training as done by MCIS and RET in the form of workshops, Tshikululu recommends further strengthening the training of HODs by the training of the trainer (TOT) programme that may be used to ensure the knowledge of the programme is contained to counter the effect of teacher attrition and to ensure that new teachers are trained in the principles imparted by the RET and MCIS programmes to ensure continuity of the innovative teaching methods, classroom management and monitoring of learner performances. Targeting HODs as champions of the programme will create sustainability in the implementation of the programme strategy. This will ensure that schools take ownership, accountability and responsibility of the programmes and move away from a dependency culture.

Tshikululu further recommends only strengthening the sustainability component of the previous cohort of schools by retraining the SMTs and HODs for 1 to 2 years to ensure that they have a good understanding of the programme and are highly capacitated in how to monitor the literacy and numeracy programmes, especially when inducting staff members who were not part of the programme. The purpose of this is to ensure that there is a good sustainability plan that has been implemented, before TF exits these schools permanently. No further intervention is needed since TF has focused its intervention on these schools for more than 5 years.

7.1.2.3 Strengthening and increasing parental involvement in schools

It is important to acknowledge TF's role in including parental involvement as part of their main objectives and MCIS and RET for conducting parent workshops. Tshikululu recommends further strengthening parental involvement in order to improve learner outcomes. This can be done by ensuring the running of parent-teacher days and workshops so that parents can track their children's performance. Research shows that the involvement of family in learning helps to improve learner performance, reduce absenteeism and restore parents' confidence in their children's education, and that learners with high levels of parental involvement are better in reading and mathematics than those with low levels of parental involvement.

7.1.2.4 Replication of the programme to new schools

Tshikululu recommends developing a proof of concept, once the proposed implementation approach has been adopted, and replicating and testing the model in other schools. Only once a proof of concept has been developed can the TF consider scaling the programme. Tshikululu also recommends a 5-year strategic focus in these schools because it is likely to take many years (five or more) to demonstrate impact. Any interventions less than this would only measure the progress of the programme. These schools can be selected by targeting those that had HOD training as a starting point. The number of new schools would need to be determined by TF funding availability.

Perhaps most importantly, as TF enters into new schools it is critical that a robust monitoring and evaluation plan is designed. This should lay out how TF expects change to happen in the schools, and what data service providers must collect, analyse and report on to show whether or not this is taking place. The lack of standardised, robust data across the Lit Num programme was a limitation that can be addressed if TF begins in new schools.

7.2 Dr Enos Mabuza Scholarship Fund programme

This section proposes recommendations for the DEMSF programme. The overall recommendation is for TF to continue working with the institutions that they are currently supporting, as these are sufficient to target a significant number of students from poor backgrounds who are studying towards a scarce skill degree. However, in order to improve access and success, several recommendations are proposed. If implemented, these recommendations could improve the service offering of the scholarship programme and will also improve the beneficiaries' experiences of the programme.

7.2.1 Develop outcome indicators

In order to measure success, TF should develop outcome indicators that are in line with the proposed ToC in this report (Refer to Section 7: Emergent ToC). In addition to the current measures (number of students in the programme, etc.) that we reviewed from the documents submitted that the programme should be able to measure the following to truly measure effectiveness and impact, year-on-year:

- throughput rates;
- dropout rate
- completion on time, n+1, etc;
- graduation rate.
- employment within three months of graduating; and
- alumni consistent and updated data.

7.2.2 Improve data management and storage

There is a need to improve data management and storage practices of the scholarship programme in order to allow TF to measure outcomes of the strategy. Improving data management and storage also requires data automation. This process will allow TF to store, organise and manipulate data using a modern centralised system. In the current approach, reporting is ad hoc and is done on Microsoft Excel. It is imperative that, as the number of students funded in the programme grows, data automation is prioritised in order to manage big data. While the final decision lies with TF in regards to software that they can use for data storage, we give examples here that can be chosen from. These are:

Microsoft Access

Microsoft Access (MS Access) is an easy-to-use tool for creating business applications from templates or from scratch. With its rich and intuitive design tools, MS Access can help TF create appealing and highly functional applications in a short amount of time. TF can adapt and develop fields for key data to be captured in MS Access.

SPSS Statistics

SPSS Statistics is a software package used for interactive or batched storage and analysis of big data. This software requires licensing and trained personnel to use it to capture data and clean, store, manage and analyse it for reports.

FlowCentric

Flowcentric Technologies provides tailor-made support to social investors requiring data management, reporting and analysis support. The strength of this approach is that funded partners are able to report directly and remotely into FlowCentric, and can also upload supporting documents.

Data management also requires TF to collect and collate data about the key indicators and this should be included in data storage. Key indicators such as student demographics, course details, academic progress, graduation rates, dropout rates and employment status after graduation will enable TF to measure programme progress and impact.

7.2.3 Early advertising

Early advertisement of the scholarship programme is recommended as it will assist TF to target top performing students earlier, before they receive funding from other scholarships. As indicated from the evaluation findings, all three HEI project administrators and students indicated that TF should release the advertisements early in the year. There was consensus that releasing the advertisement/call for applications late impacts negatively on the programme as students will only receive their scholarship funds when they are already studying.

7.2.4 Introduce TF-dedicated orientation programmes

The first year is the hardest for students as they will need to adapt from high school to life in a tertiary institution. TF should introduce a TF-dedicated orientation programme that will serve the purpose of preparing the grant recipients for higher education. It could also serve other purposes, such as career guidance and orienting the students about to access psychosocial support or any other services or support that they require. Additionally, it could also serve as an opportunity for TF to be known as a brand by prospective students.

The orientation programme should also inform the students about TF, which is a missed opportunity, as evidenced from the findings. An orientation will allow TF to form and develop strong relationships with their future leaders, employees, brand consumers, etc.

The orientation programmes will also allow the students to connect to each other and form social circles. This gap came through quite clearly throughout the FGDs. The students are disconnected from each other and are disconnected from the TF brand. Using an orientation programme as a platform, we recommend that the programme introduces the following initiatives so that the students, graduates and the TF team can build a community unit which will drive the overall strategy of the programme: i) onboarding of new students so they can meet each other as well as meeting the returning students and TF team; ii) peer-to-peer mentoring for students to start forming a unit

and support each other; iii) networking opportunities with the TF group to assist with employment opportunities within the group in order to support the over strategy of the programme by ensuring that the programme's graduates are developed and supported from the beginning of their studies through to the world of work.

7.2.5 Allowance disbursement process

There is a current challenge of double-dipping and over payment of tuition and residence fees by TF. This process needs to be restructured. The tuition fees and residence payments need to be based on the actual full year's fees when selection happens, which is more reason to have the recruitment and selection process finalised earlier in the year. The financial aid offices of the HEIs also need to crosscheck and to flag students who have received other funding. This needs to be done on a quarterly basis. The disbursement process can further be restructured as follows: i) the current process of paying tuition fees directly to the relevant HEI should remain as funds are allocated to the student accounts in a timeous manner; and ii) TF should be in total control other allowances (i.e., food, accommodation, books, etc.) and of how each student scholarship breakdown is made up of in order to communicate this to the financial aid offices of the HEIs and any 3rd party the HEIs have outsourced the disbursement payments to. The allocation amounts need to come directly from TF and not the financial aid offices.

The rest of the allowances are currently paid through a 3rd party, Fundi Capital, by the HEIs. The communication lines between the HEI, students and Fundi Capital are strained as students never know who to approach with queries and, as such, information ends up being miscommunicated. We recommend that TF has an independent partnership with Fundi Capital so that students are clear on the communication channels when it comes to tuition fees (HEI), while all other allowance queries are dealt with through Fundi Capital. This will limit late allowance payments, ensuring students receive their allowances on time so that they can buy their prescribed textbooks and meals.

7.2.6 Review the student's allowance

There is a need to review the allowances paid to students to ensure that they are on par with the cost of living. The current R1 500, which is disbursed monthly, is not adequate to cover the monthly expenses of the students. The respondents in the study mentioned that some students turn down the TF scholarship because other scholarships and bursaries provide bigger allowances that are in line with the cost of living. The allowance can be reviewed by conducting a benchmarking exercise against similar programmes and NSFAS, as different factors can play a role in deciding what the final amount should be (e.g., meal allowance and a small stipend to cover other essentials vs no meal allowance but a generous stipend that covers both meals and essentials).

7.2.7 Student's allowance

Another recommendation is that student allowances should be paid directly to the students' accounts and not through the HEI. This approach will reduce administrative challenges faced by the HEIs and ensure that student allowances are paid timeously.

Following the validation workshop, and as noted in this evaluation, the DEMSF programme is funded from the skills budget. To support B-BBEE, it should be paid to the university and not the students. TF can continue paying student allowances to the participating universities as long as TF has the influence to ensure that the universities release meal allowances to students earlier in the year so that students are guaranteed of a meal.

7.2.8 Provide wrap-around support

As per the earlier findings shared in the literature review section, data shows the importance of supporting students holistically in order to set them up for success, more so for first-generation students who are the target market for the programme. Holistic support includes financial, academical, psychosocial and career development support.

As academic and psychosocial support is available, although to a lesser extent, the programme would have a much bigger impact with the introduction of work-readiness support. This can be implemented in the form of soft-skills training workshops, mock interview sessions and peer-to-peer mentoring involving the alumni who have graduated and have embarked on their careers. Work-readiness support could also involve TIC's learning and development team, since the programme consultant cannot be the only individual providing all the support, especially work-readiness support.

The students interviewed during the FGDs were consistent in what kind of support they needed, based on their personal backgrounds and experiences, to successfully transition from high school to higher education and to the world of work. The graph below summaries the types of support they need.

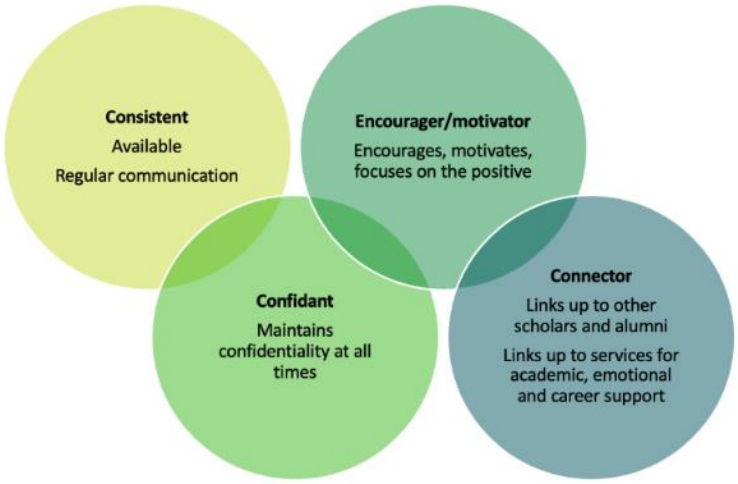


Figure 26: Figure 26: Student Support Qualities

The support we recommend be included in this regard are:

- Academic support in order to monitor, track and assist students before they fail. This will encourage them to maintain the 60% average they are required to achieve in the year.
- Psychosocial support, which would include soft-skills development as well as mental health wellness. Both of these support systems will help to develop confident and well-rounded students. Themes to be covered can include, are not limited to, financial literacy, time management, stress and anxiety management, study skills, etc.
- Career development support will help unemployed graduates who become alumni of the programme. Having to support the students and help develop their work-readiness soft skills, while they are still on the programme, will not only help them become more self-aware and confident, but will help them become more employable graduates.

7.2.9 Provide laptop allowance

Some students have no access to devices and, thus, cannot access their academic curriculum and/or submit assignments. We recommend that the current book allowance provides a laptop to those students who need devices. These devices can be monitored and reported on annually to ensure that students do not misuse them, should they have bought a device already.

7.2.10 Mainstreaming disability

TF's social investment strategy is underpinned by B-BBEE legislation, which has made a significant contribution to the lives of people from the poor backgrounds in response to socio-economic requirements. While major strides have been made in increasing the number of students benefitting from the DEMSF programme, there is room to target students with disability (SWDs) to ensure that they are supported. SWDs constitute a minority group within the student populations of all HEIs. Consequently, little is known about the experiences of these marginalised students. In South Africa, this group of students has been disadvantaged, as identified by Chiwandire and Vincent (2019), who state that the introduction of progressive funding models, which include disability scholarships, would increase access and participation of SWDs in tertiary education since public funding for SWDs is limited. The authors further explore the barriers that place SWDs at a substantial educational disadvantage compared to their non-disabled peers. These barriers include bureaucratisation of application processes, cuts in public disability funding, means-test requirements, lack of scholarships and inadequate financial support to meet the day-to-day costs that arise as a result of disability. Increasing access and offering improved opportunities to SWDs would constitute an especially important societal focus.

8. Emergent Theory of Change

A Theory of Change (ToC) is proposed in this section. This ToC would underpin the broader strategy of the TF for both the Lit Num programme as well as the scholarship programme. A ToC is a useful tool that will enable the TF to monitor and evaluate the programme as the education strategy is scaled up. A ToC can also inform the development of quantitative and qualitative outcome measures that would help the programme to target its decision-making. Causal pathways, which are clearly mapped in the ToC, will be a useful to measure and monitor what needs to be achieved at key milestones from the outputs, outcomes and impact levels.

8.1 Recommended programme: Theory of change

A ToC is a schematic that illustrates how desired change is expected to happen. It is used to reach agreement on the way to achieve impact and as a learning tool. A ToC represents the relationship between actions and results.

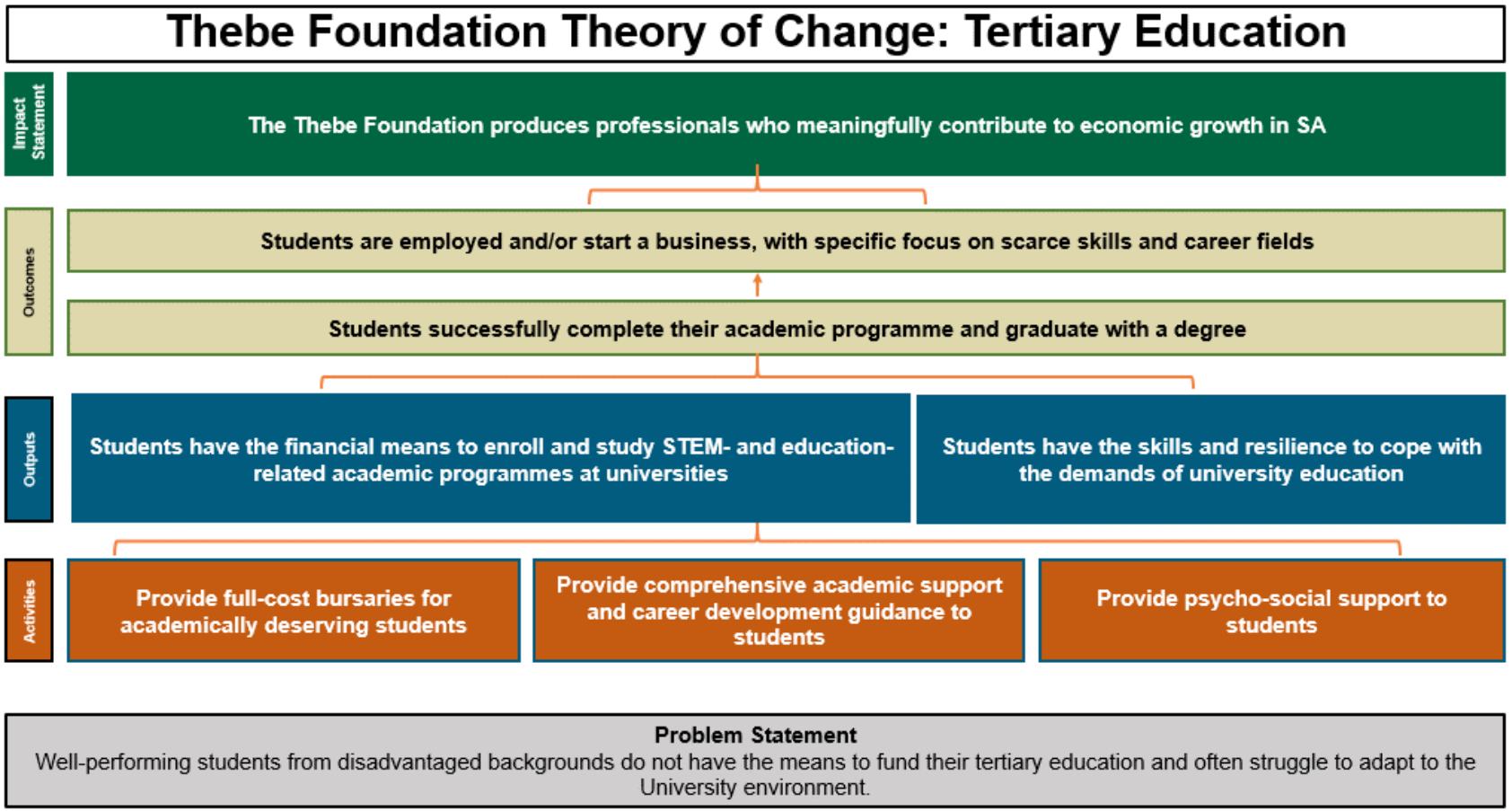


Figure 27: Proposed Thebe Foundation Theory of Change – tertiary education

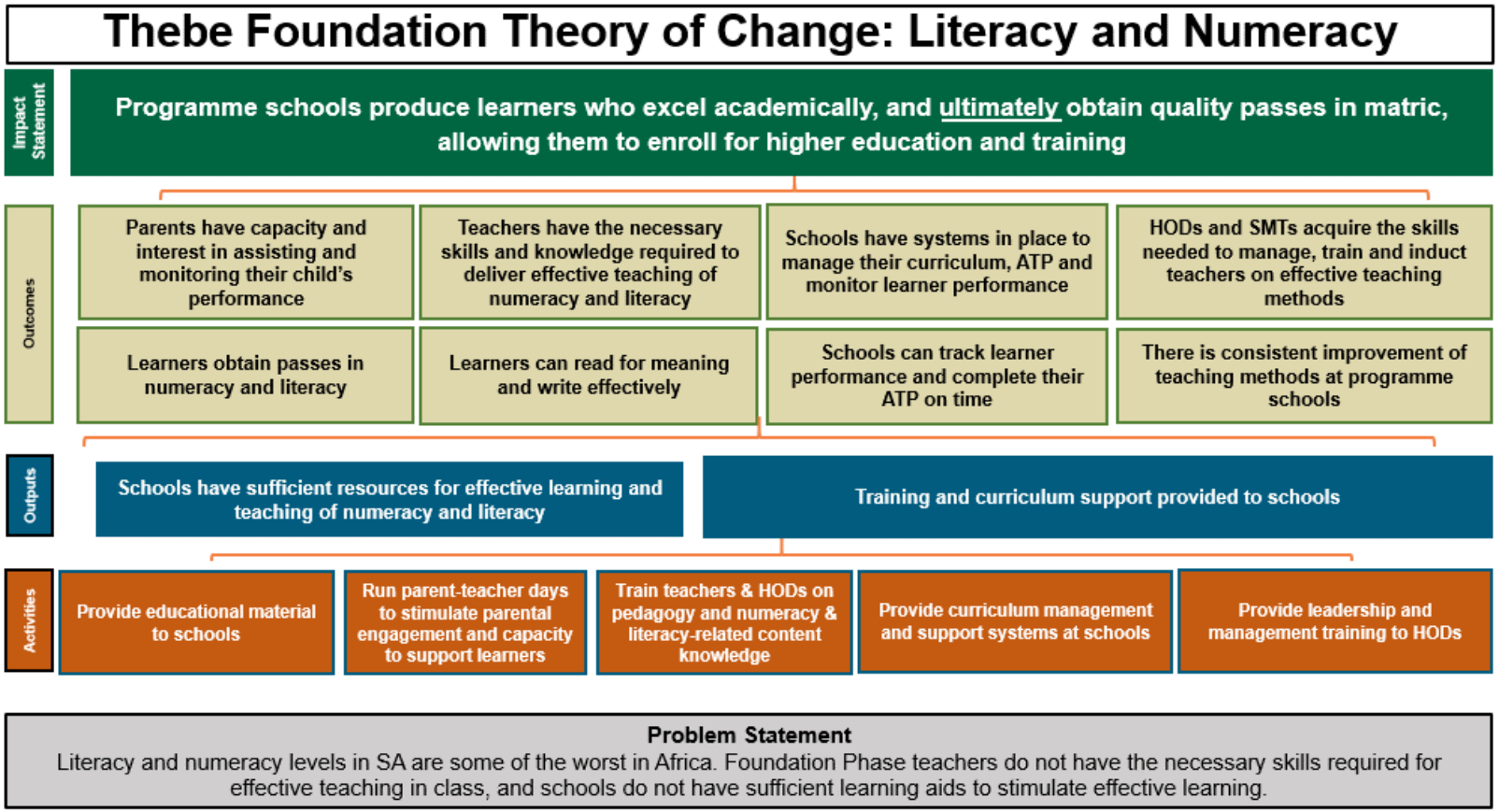


Figure 28: Proposed Thebe Foundation Theory of Change – literacy and numeracy

The ToC in the table above provides an outline of the activities, direct outputs and outcomes of the programme pillars that the TF supports. The approach outlines the step-by-step logical linkages to attaining the objectives of the foundation. The programme implementation objectives are to support primary school education by providing training to teachers and school HODs, to support schools with learning materials and aids, to ensure that schools have the necessary support systems to track learner performances and complete their ATPs efficiently and to stimulate parental involvement and provide support to parents who do not have the capacity to monitor and assist their children with their studies.

The scholarship programme approach is to support students through their academic programme from first year, until they obtain their degrees by providing funding for their tuition, accommodation, transport and learning material; by providing academic support when needed; and by providing psychosocial support to students to help them adapt to the demands of higher education and university life.

8.1.1 Assumptions

Assumptions are factors that cannot be proven to be true or false but are accepted to be true during the planning and inception of a programme.

Dr Enos Mabuza Scholarship Fund programme

- Prospective scholars qualify and are accepted to study the TF-related academic programme.
- Students are interested in pursuing a career in the fields within TF's associated organisations and subsidiaries.
- HEIs are willing to, and have capacity to, administer the funds provided by the programme.

Literacy and Numeracy programme

- Schools are willing to work with the programme partners.
- The DBE supports the intervention.
- Teachers are open to learning new teaching methods.
- HODs are willing to champion the adaptation of the programme in the schools.
- Parents have the willingness to be involved and participate in their children's education.

Cross-cutting assumptions

- There are experienced programme partners to implement the programme.
- There are sufficient funds from the TF to support the programme strategy.

8.1.2 Risks

These are factors that can have a negative or positive effect on the success of the programme should they happen. Risks that are written in italics were identified by TF as threats in the 2019–2024 TF strategy document

Dr Enos Mabuza Scholarship Fund programme

- Universities poorly manage scholarship programme, including poor fund disbursement.
- Poor performing students who will not finish and drop off from the programme.

Literacy and Numeracy programme

- Selection of ineffective implementing partners may result to ineffective application of best practices to achieve the intended programme outcomes.
- Lack of buy in from communities.

Cross-cutting themes

- Limited programme monitoring expertise may lead to insufficient evidence collection, collation and processing of data to inform programme progress towards achieving the intended objectives and for evaluation.
- Limited availability of social investment funds from TF to fund implementation may compromise the quality of delivery activities and resources required to achieve the intended outcomes.

8.2 Output and outcome indicators

Indicators are units of measure that demonstrate change. Output and outcome indicators should be developed in line with the proposed ToC so that they can be used during programme implementation to measure change. Baseline information, performance benchmarks and target setting will also aid in measuring progress towards the set objectives.

9. Conclusion

In conclusion, the evaluation demonstrates that in general the TF met its set goals and objectives in both the Lit Num and the DEMSF programme. Based on the quantitative data, the Lit Num programme improves learner performance in funded schools using a teacher-focused approach, while the scholarship programme broadens access to academically capable but financially disadvantaged students. Overall, end beneficiaries have benefitted from the funding. Education is used to emancipate students and learners from poorer communities who, without the funding from TF, would not be able to achieve and follow their dreams to become active economic participants. TF is able to build strong communities, specifically using Mpumalanga as an entry point to primary schools that are centres of excellence in basic education. The approach of starting in a province that mostly rural and poor is aligned to the province's ethos of building empowering communities. The scholarship programme is aligned to this ethos because it targets students with poor backgrounds especially those students from rural, peri-urban and urban (although poor) areas who would not be able to access and succeed in their studies if they had not received the scholarship. The impact that the TF has made on empowering communities in the basic and tertiary education sector can, therefore, not be underestimated.

In addition to the impact made, TF has implemented both programmes relatively efficiently and effectively, considering what the country requires in terms of scarce skills, while being cost effective in the process. The funding, which targets deserving but financially challenged students, has focused on scarce skills so that the country increases the number of graduates in these sectors. The use of MCIS and RET as implementing partners/vehicles has helped TF to achieve its goal of ensuring that schools receive adequate support to utilise resources that they receive from TF and from the DBE to improve learner performance. The technical support that the schools received has, to a large extent, been able to buffer the schools from systemic challenges that engulf all primary schools in South Africa. For instance, the support on identifying challenges in covering the CAPS curriculum, pedagogy skills, lack of resources have been addressed using the funded partners.

As evidenced from the evaluation, there are areas for improvement as well. Perhaps most importantly, TF must strengthen its collection, analysis, use and reporting of quantitative data to monitor and measure programme effectiveness. The lack of robust quantitative data was a major limitation of the evaluation but is also a major limitation of effective implementation.

A key gap in the Lit Num model is the creation of a dependency on TF funding and a clear lack of sustainability. While this is understandable, considering the systemic challenges in the basic education sector, such as high educator attrition rates, poor teacher training, the impact of Covid-

19, lack of parental support and engagements amongst others identified in the report, TF should improve sustainability in programme schools so as to maximise social return.

For future iterations of the programmes, it is recommended that, in the quest of creating empowered communities and schools, TF should increase its funding to target new schools in Mpumalanga. A technical recommendation (referred to as option 1 in this report) is recommended so that TF can specifically focus on Foundation Phase (Grades R to 3) including Grade 4, because learners without foundational skills will face challenges later in life. It is within the Foundation Phase that learners start to grasp challenging concepts and a teacher's influence on learners at this early learning stage is immense. The inclusion of Grade 4 could ensure a learner's successful transition into the Intermediary Phase and track to see whether learners have acquired the necessary foundational skills that will strengthen their literacy and numeracy skills in the future. With respect to the schools that were previously funded, we recommend that TF continues to fund these schools, using a two-year timeline in order to address issues of sustainability. The strategy to be used is the training for school leadership strategy, using the TOT approach in order to address the sustainability gap. Training of teachers and HODs for sustainability has also been one of the key areas of improvement from the data collected from schools, echoing the necessity of the TOT approach.

There are some recommendations for the scholarship programme to ensure that the experiences of end beneficiaries in the DEMSF programme are improved. These recommendations are mainly programmatic and are focused on gearing up the provision of psychosocial and wrap-around support, mainstreaming disability to improve access and success for students with disabilities, reviewing monthly allowance, and publishing the call for funding earlier so that the TF recruits 'cream of the crop' students before they are taken on by other scholarship providers.

The report has also provided an emergent ToC that TF can use to monitor and evaluate its programmes. There is a need for TF to develop indicators to use alongside the ToC to monitor and evaluate change during implementation. Automating data storage, analysis and reporting will be a key benefit to the scholarship programme, while conducting standardised assessments in supported schools will aid benchmarking school performance and enable them to respond to their needs.

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11. Appendices

Appendix A: Invitation letter to participate in the TF evaluation

Appendix B: Interview guide and questionnaire for university students

Appendix C: Electronic Survey Questionnaire University student

Appendix D: Bursary programme key informant questions

Appendix E: School Management Teams summary questionnaire

Appendix F: Literacy and Numeracy HODs questionnaire

Appendix G: Learners Focus Group Discussion Questions

Appendix A

Thebe Foundation Evaluation Invitation Letter

Date: 30 August 2021

Dear Colleague,

REF: INIVATION TO PARTICIPATE IN THE THEBE FOUNDATION'S LITERACY-NUMERACY AND BURSARY PROGRAMMES END TERM EVALUATION AND STRATEGY REVIEW

The Thebe Foundation has appointed Tshikululu Social Investments to conduct an end-term evaluation and strategic review of the literacy-numeracy and bursary programmes.

The Thebe Foundation was established as an independent trust to drive Thebe's corporate social investment strategy. Education and Enterprise Development are the two anchor programmes established in response to the needs of the community. The rational for the end term evaluation in this assignment is threefold, as described below:

• Evaluate programme impact: Evaluating the extent of efficient use of financial and human resources; measuring efficiency of how set objectives were reached and coherence of whether the programmes are aligned with the Department of Basic Education (DBE) and Higher Education and Training (DHET) strategic plans.

• Enhance project implementation: The end term evaluation will provide an opportunity to learn lessons relating to success, failure, intended and unintended consequences of the project

• Promote accountability and transparency: The evaluation will allow Thebe Foundation to promote accountability for all its social investments. If appropriate, the end of term evaluation findings can be shared with okey stakeholders like the DBE, DHET and other partners to promote transparency and learning.

The evaluation is to inform the Thebe strategy on what went well and what did not go well, which strategic objectives were achieved and those that need to be enhanced going forward and put forward recommendations for continuous improvement of the model.

Due to your role that you play in the education sector, we would like to invite you to participate in the Thebe Foundation evaluation. If you are willing and able to contribute to this important project, please confirm with the client relationship coordinator, Deepa Patel from Tshikululu Social Investments on 0837882974, email dpatel@tshikululu.org.za, who will then communicate with your additional detail. We request your support in making this evaluation a success and look forward to your input.

Thanks very much, and please let the above contact person know if you have any questions or concerns as well.

Kind Regards

_____

Mr Lehlohonolo Chabeli

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Thebe Foundation | Reg No. IT1062/2011

Trustees: Dr. Y Dladla, Mr. VP Khanyile, Ms. L Vilakazi

Appendix B

Interview questionnaire: University students

You have been selected to participate in the Thebe Foundation end term evaluation. We would like to request your input in the data collection process which will provide valuable information for Thebe Foundation to measure the extent to which impact was reached and also help the foundation improve its programme.

Please be as honest as you can in your responses. The responses collected here will not be used to penalise or disqualify you from the bursary programme, but it will be used to learn lessons and improve the bursary programme.

Graduate Details

In this section, we would like to get your personal information

- Name and Surname

  ……

- Age in years

  ……..…

- Course/Degree Name

  ……

- Was this your first choice of qualification to study?

  1=Yes 2=No

  ……..

- Status

  1= Studying 2 =Graduated

  ……

- If the answer is graduated above, were you able to find employment after graduation?

  1= Yes 2 =No

  ……..

- Sex

  1=Male 2 =Female

  ……..

- Name of the institution where you are studying/studied?

  ……..

  1=Sol Plaatje University 2=University of Mpumalanga

3=University of Cape Town 4=University of Witwatersrand

5=University of Johannesburg 6= University of KwaZulu Natal

7= University of Western Cape 8= Central Johannesburg TVET College

- Type of settlement at home

  ……..

  1=Urban 2=Peri-urban (mostly informal/small holding

  3=Tribal settlement/Farming 4=Rural

- Household Size

  (This refers to the number of people that you live with in the house and share at least one meal a day (when you are not at school)

  1 = One 2 = Two to Five 3 = More than Five

  ……..

- Race

  "This is asked in order to report on how the programme is responding to the needs of underserved populations"

  1=African 2=Coloured 3=Indian 4=White 5=Other (specify)

- Do you have any form of disability?

  1= Yes 2=No

  ……..

  If you answer is yes, do you have the necessary resources to enable to study still successfully?

  ……

  ……

Application and selection Process

In this section we would like your opinions about the application process for the Thebe Foundation

A Bursary Programme

1 Do you know the Dr Enos Mabuza Bursary Programme?

1=Yes 2 =No

……..

2 How did you find out about the Dr Enos Mabuza Bursary Programme?

1 = Friend/Colleague 2= Newspaper 3= High School/University

4= Bursary Register Handbook 5= Media (TV, Radio, Newspaper)

6= Internet Search 7= Other (Please specify)

3 Would you recommend a friend to apply for the Dr Enos Mabuza Bursary Programme?

1= Yes 2= No

……..

4 Please provide explanation to your response.

……

……

5 Please explain how were you selected to be part of the Dr Enos Mabuza Bursary Programme?

……

……

B This section asks you about the impact of the bursary in your life

1 How has it helped your academic performance?

……

……

2 Is the bursary you receive from TF sufficient for your studies for the year?

……

……

3 If you answer is not above, do you have any other sources of funding?

……

……

4 Do you have sufficient cover for books? Food? Transport? Learning material including stationery? Personal use, including cosmetics and social activities?

1= Yes 2=No

……..

If no, please specify

……

……

Do you get funding from other sources to supplement this bursary?

1= Yes 2=No

……..

If so, what do they cover?

……

5 Do you use any portion of the funds to assist your family or children?

1= Yes 2=No

……..

6 Outside of the financial assistance, what other support did you receive from the bursary?

……

……

7 Was this support helpful?

1= Yes 2=No

……..

Please explain your answer above.

……

……

8 What do you know about the Dr Enos Mabuza Bursary Programme?

……

……

9 If you did not receive the Dr Enos Mabuza bursary, what other choices did you have?

……

……

C This section asks you about impact.

1 What do you like most about the bursary programme? Please explain.

……

……

2 What do you dislike most about the bursary programme? Please explain.

……

……

3 What can be done better to improve the bursary programme. Please give us top 3 ideas below

3.1……

3.2……

3.3……

4 Do you have any other comments you would like to add?

…….....

Thank you for participating.

Appendix C

Key Informant Interviews: University admin personnel

The TF is conducting an end term evaluation to measure the extent to which impact was reached by its Thebe Foundation (TF) Bursary Strategy. You were selected as a Key Informant to Participate in these semi structured interviews.

Semi Structured Interviews with Universities Project Administrators- To be sent out to all University Project Administrators via Survey Monkey

Name and Surname ……

Title ……

University Name ……

How long have you been involved in the TF programme (please state year)?

……

1. RECRUITMENT AND ADVERTISING

1.1. What criteria do you use to provide funding to financially needy students?
1.2. To what extent do they attract your target market, i.e., the specified pool as stated in the selection criteria?
1.3. Is this function (recruitment and advertised) outsourced?
1.4. If “yes” what are the reasons for outsourcing it?
1.5. What form of advertising do you use to make the bursaries known to the public?
1.6. What are the strengths of the advertising media you use?
1.7. What are the weaknesses of the advertising media you use?
1.8. How is the selection process conducted?
1.9. What are the strengths of the selection process?
1.10. What are the weaknesses of the selection process?
1.11. How would you improve on the current recruitment and advertising process?

2. ORIENTATION

2.1. Do you have an official orientation and/or onboarding programme?
2.2. Is this function outsourced?
2.3. If “yes” what are the reasons for outsourcing it?
2.4. What are the strengths thereof?
2.5. What are the weaknesses of the orientation programme?
2.6. What can be improved with the current onboarding process?

3. FUND DISBURSEMENT PROCEDURE

3.1. Do the students know the terms and conditions of the bursary? Payment cycle, etc.?

3.2. How exactly do the students access the funds for the set expenses?

3.3. Is this function outsourced?

3.4. If “yes” what are the reasons for outsourcing it?

3.5. To what extent is the bursary amount sufficient with what it has to cover exactly—tuition, books, accommodation, living expenses?

3.6. How has this funding evolved over the past three years?

4. VALUE –ADDING INTERVENTIONS/ SUPPORT MECHANISMS

4.1. What specific value adding support do you provide to your students?

4.2. Please give details of the implementation of each of your value adding interventions, e.g., mentoring, winter school, selected for workplace orientation, psychosocial support etc.

4.3. To what extent are these customised to fit the different needs of each student?

4.4. How have the support mechanisms evolved over the past three years?

4.5. What is the value and impact of these interventions?

4.6. How has this been monitored?

4.7. To what extent do you think the bursary has helped retain students who might have otherwise dropped off from tertiary institutions?4.8 Is any part of the value-added support function outsourced?4.9 If “yes” which elements are and what are the reasons for outsourcing those areas of support?

5. ANNUAL ASSESSMENT OF BENEFICIARIES

5.1. How do you make your annual assessments of your students?

5.2. If the students report back to you, how do they do so, i.e., verbally, write on templates, qualitative and/or quantitative reports?

5.3. How often do they report back to you?

5.4. What concerns do the students express the most? How has the programme solved for these concerns once they were brought up?

5.5. How efficient are these reporting systems in assisting you with the annual assessments of your students?

5.6. Do you have specific targets for throughput, pass rate, aggregate rate, minimum dropout rates?

1= Yes 2=No

5.7. Are you able to meet the specified specific throughput rate, pass rate, aggregate rate, and minimum dropout rate?

5.8. In your opinion, to what extent is the drop out a result of academic challenges vs. Extraneous circumstances?

5.9. If extraneous circumstances are a big factor, how can the fund mitigate against it?

6. UNIVERSITIES REPORTING TO TF

6.1. What is your perception of the reporting mechanisms, i.e., is the template effective, user-friendly, ease of measurement and monitoring of the various activities and set objectives, e.g., throughput rates, etc.?

6.2. How has this changed over the period in which it has been introduced?

6.3. How would you improve the reporting template?

6.4. Are the set objectives/ targets set by TF clear, realistic, or not?

6.5. Have the targets simplified or increased the complexity of managing the funds?6.6 How can TF improve on their objectives/targets taking into account findings from similar programmes and industry insights?

7. UNIVERSITIES INTERNAL MECHANISMS

7.1. How would you describe your university's relationship with the students and TF?

7.2. What is your assessment of your internal management processes, structures, and reporting systems with how these affect the students?

7.3. How can these be improved?

8. UNIVERSITIES RELATIONSHIP WITH TF

8.1. Did TF give clear direction of shared objectives, etc.? If yes, how was this best achieved?

8.2. Compared to the other funds you manage as a provider, how do you find the experience of managing the TF fund, and why?

9. IMPACT

9.1. To what extent does the bursary enable students to access the wider range of the university's academic provisions?

9.2. To what extent does the bursary enable students to access the wider range of the university's social or other provisions?

9.3. What, in your view, is the impact of the bursary fund to the student's life?

9.4. What differentiates your students from other students?

9.5. How "radical" or innovative is the TF fund, i.e., to what extent is it relevant to or flexible enough to meet the needs of today's students?

9.6. In your opinion, what are the top 3 strengths of the TF programme overall?

9.7. In your opinion what are the top 3 weaknesses of the TF programme overall?

9.8. What can be done to improve these?

9.9. Does TF offer bursaries to students with disabilities?

1= Yes, 2 =No

9.10. Please explain your answer?

9.11. What in your view are additional key issues that this investigation should uncover regarding the impact of the disbursement process on the students?

ADDITIONAL COMMENTS/NOTES

Appendix D:

Bursary programme key informant questions

Type of information	Questions
Interviewer's notes	• Date and time of the interview • Is the interview being recorded (has consent been given) • Have the goals of this exercise been thoroughly explained?
Participants' details	• Full names of the participants • Designation • Length of service at the institute
Objectives of the bursary programme	• What are the goals of the programme • What nature of support has been provided to the bursars • How is the programme aligned to national educational imperatives
Implementation	• What process is followed to implement the programme (followed by probing questions) • Lessons learned • Highlights, successes, and challenges
Outcomes	• What has been the impact on the direct beneficiaries? • What have been the positive results (any unintended consequences too) • How can the programme be improved?

Appendix E

School Management Teams summary questionnaire

Please collect the following details: What class (Literacy and Numeracy) did they teach during implementation, their name?

1. From your understanding, what problem was Maths Centre and Read trying to solve in your school?
2. What activities did they implement in your school?
3. What is the impact of the programme on end beneficiaries? What were the key implementation elements that made the programme un/successful? Would the learners achieve the results they did in numeracy and literacy if it was not for the programme intervention?
4. What have been the effects of the programme? Probe Lit Num? Probe As they progress to higher grades?
5. What would you say have been highlights of implementing your programme in relation to the Thebe Foundation Education Strategy?
6. What have been some of the key lessons that have been learned by your school through implementing your programme in relation to the Thebe Foundation Strategy?
7. How did the teacher-focused approach contribute to the success (or otherwise) of the programme
8. How relevant is the strategy in light of the needs in the education sector?
9. What can be done to strengthen the programme in future? Probe What Thebe can do? What the school can do?
10. Other:

Appendix F

Literacy and Numeracy HODs questionnaire

1. Background information
    - Date and time of the interview
    - Is the interview being recorded (has consent been given)
    - Have the goals of this exercise been thoroughly explained?

2. Objectives and implementation of the literacy/numeracy programme
    - What are the goals of the literacy/numeracy programme?
    - What nature of support has been provided to the learners/teachers/classrooms
    - How is the programme aligned to national educational imperatives?
    - What process is followed to implement the literacy/numeracy programme (followed by probing questions)
    - Highlights, successes, and challenges
    - What informed the change in the strategic focus in the Foundation Phase Grade 1-3 to only Grade R? What led to the introduction of the intermediate and senior phase?

3. Outcomes
    - What has been the impact on the direct beneficiaries?
    - What have been the positive results (any unintended consequences too)
    - What has been the impact on the direct beneficiaries?
    - What have been the positive results (any unintended consequences too)

4. Lessons learned
    - How can the literacy/numeracy programme be improved?

Appendix G

Primary school learners' questionnaire

1. When were you part of the programme? What Grade were you in?
2. How have you benefitted from the programme?
3. How different do you think this programme is from the traditional way of learning that you are used to?
4. Have you been able to use/apply what you have learned? Please explain how?
5. What challenges did you experience?
6. What can be done to improve the challenges that you mention above?
7. Any other information you would like to share?