

gauteng



education
development trust

TERMS OF REFERENCE

TERMS OF REFERENCE FOR AN EVALUATION OF THE FOUNDATION PHASE LITERACY MOBILE LIBRARY SERVICE

for the Gauteng Education Development Trust (GEDT)

October 2020

Prepared by JET Education Services (JET)

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Introduction and Background

Background to the Foundation Phase Literacy Mobile Service

Mobile Library Services initiative

The Gauteng Education Development Trust (GEDT) funds the **Mobile Library Services initiative**, which the Foundation Phase Literacy Mobile Library Service forms part of. The Mobile Library Services initiative is aligned with the Department of Basic Education's (DBE's) National Guidelines for School Library and Information Services, (DBE,2012) and supports the following DBE initiatives:

- The **Read to Lead Campaign** <https://www.education.gov.za/Programmes/Read2Lead.aspx>
- The **National Reading Coalition** <https://nrc.org.za/>
- The **Drop all and Read Campaign** in schools which requires that learners read for enjoyment for 30 minutes daily.
- The establishment of **Reading Clubs** to allow learners to read in groups or clubs to promote a culture of reading.

The **Mobile Library Services initiative** is led by the *Provincial* Gauteng Department of Education (GDE) Library Services (LS – LSTM Directorate) and provides Library Services to schools in informal settlements and rural areas. It supports two of the GDE's strategic goals:

- Goal 1: *Delivering Quality Education in modern and conducive learning environment*; and
- Goal 3: *Transforming public schooling by addressing barriers to access, equity and redress.*

The **Mobile Library Services initiative** has been running since 2000, initially supported by donor funding, and since 2008 by the GEDT. A new four-year funding cycle has been recently approved, spanning 2019-2023.

Foundation Phase Literacy Mobile Library Service

The Gauteng Department of Education (GDE) **Foundation Phase Literacy Mobile Library Service**, popularly known as **the Reading Bus**, was launched as a pilot project in September 2016 reaching 11 schools. It has expanded since then – due to initial popularity and success - and is currently serving 29 schools across five education districts.

Background to the evaluation

An independent, external evaluation being commissioned by the GEDT for a variety of reasons, which include accountability (as public money is involved), documenting and learning from implementation to date and establishing a foundation for future monitoring and evaluation. This is the first time that the Mobile Library Services Initiative is being evaluated.

About the Foundation Phase Mobile Library Service

Rationale

The 2016 Progress in International Reading Literacy Study (PIRLS) reveals that, 78% of South African Grade 4 learners did not have basic reading skills by the end of the academic year (Howie et al, 2016). One recommendation is the provision of library resources to schools, and specifically in classrooms where performance is poor.

In Gauteng, only 31% of all Public Ordinary Schools have functional or partially functional school libraries (GDE, 2017). The Mobile Library Services initiative is an attempt to close this gap and provide quality resources for reading, teaching and learning to learners and teachers.

Participation and reach

The Foundation Phase Mobile Library Services initiative serves the Foundation Phase (i.e. Grade R to 3) of primary schools in rural areas and informal settlements in five Gauteng education districts: Tshwane South, Tshwane West, Tshwane North, Gauteng North, Ekurhuleni North. Participating schools should be without a library, not situated near a community/public library and committed to participating. The final selection of schools is done in cooperation with the District Library Facilitator (GDE, undated). Thirty-one schools have been reached to date, and in 2019, 26 schools, 365 Foundation Phase teachers and 14,565 learners were reached (GDE, 2020).

Description of the initiative

The initiative aims to inspire a love of reading, amongst teachers and learners, such that learners will read for enjoyment and ultimately improve their reading skills.

Onboarding activities are conducted with participating schools which entail: meeting with the school management team (SMT) to discuss the objectives of the service and explain how the service will be implemented at the school. This also serves to determine the commitment of the school.

The Reading Bus, including a driver and librarian **visit schools throughout the term** from Monday – Thursday, one school a day. Colourful mats and gazebos are set outside and the team presents literacy activities that include book reading, storytelling, puppet shows, rhymes and songs in a fun and interesting manner, intended to make reading fun and encourage reading for enjoyment.



Figure 1: Foundation Phase Mobile Library Service

Discussions are held in-between and after each activity to allow the learners to engage on the story read, and for the Reading Bus team to gauge the learners' comprehension. Various reading promotion days are celebrated throughout the year.

There is a lending service available to the teachers to support reading post visits. Teachers can borrow up to 10 resources at a time to enhance their classroom reading corners. Teachers are also encouraged to read for enjoyment; there is a teacher's shelf onboard that contains books teachers can read for leisure.

Reading resources are available in Afrikaans, English, isiXhosa, isiZulu, Sepedi, Setswana and Xitsonga, which are the languages of learning and teaching in supported schools and reading activities are delivered in Afrikaans, English, isiZulu and Sepedi, and teachers assist by reading in the other languages and interpreting for learners when reading activities are in English.

The programme theory (i.e. theory of action (ToA) and theory of change (ToC))¹ for the Foundation Phase Mobile Library Service should be documented as the first step in the evaluation.

¹ The ToA explains what the intervention does whilst the ToC refers to *the mechanism(s) through which change occurs*, (Funnell & Rogers, 2011).

Monitoring data and instruments available

Data is kept and is available from 2016 - 2020 on the number of school visits, number of teachers and learners reached, number of learners read to and the number of books borrowed (GDE, 2020).

A survey was conducted by the GDE in 2018 with participating schools/teachers to obtain feedback on access to and use of Foundation Phase mobile library service resources, reading for enjoyment, satisfaction with the service offering, challenges and suggested improvements. This data and a report will be made available to the appointed evaluator.

A review of the Gauteng Mobile Library Project was conducted by JET Education Services (JET) in 2009; the report (JET, 2009) will be made available to the appointed evaluator.

A data collection rubric has been developed to assess Foundation Phase learners wrt the following aspects: print awareness; reading comprehension; phonemic awareness; reading comprehension; vocabulary and spelling. This can be made available to the evaluation team.

Key stakeholders

Key stakeholders in the evaluation include the GEDT, the GDE (particularly the LS – LSTM, as well as the research and evaluation Directorates), participating schools (principals, SMT members, teachers and learners).

Evaluation Scope of Work

Evaluation purpose

This is primarily a **formative evaluation** which should generate insights to **inform improvement**. However, the evaluation should also reflect on the effectiveness and success of the **Foundation Phase Literacy Mobile Library Service** to date, and confirm expected/intended outcomes and indicators which can be used for ongoing monitoring and future evaluation studies.

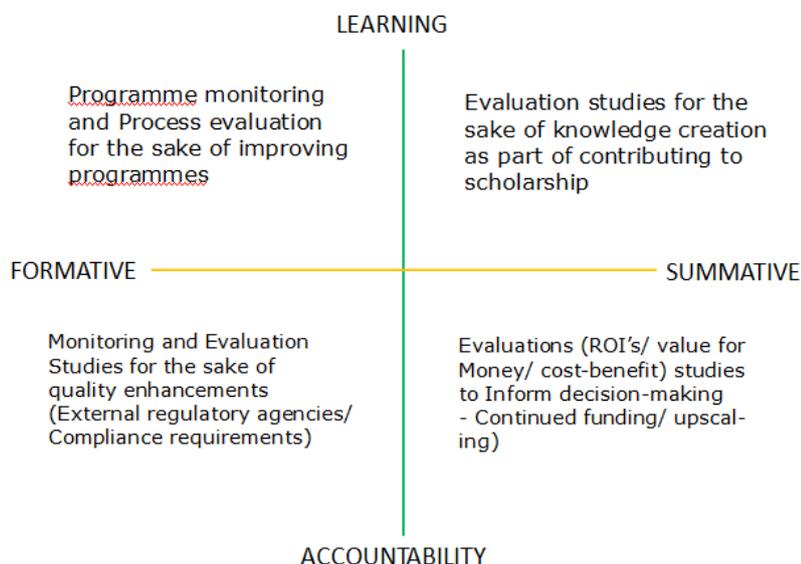


Figure 2: Evaluation purpose, (CREST, 2014)

Evaluation users and uses

The following **primary and secondary evaluation users and potential uses** have been identified:

Table 1: Evaluation users and uses

Users	Uses
Primary users	
GEDT	<ul style="list-style-type: none"> • Confirm the theory of change; • Identify outcomes and indicators to inform ongoing monitoring and future evaluations; • Obtain an independent verification of the results reported quarterly by the GDE; • Understand strengths, weaknesses, successes and challenges regarding implementation and identify areas for improvement; • Make funding decisions and potentially raise additional funding.
GDE (LS – LSTM Directorate)	<ul style="list-style-type: none"> • Confirm the theory of change; • Identify outcomes and indicators to inform ongoing monitoring and future evaluations including a possible impact evaluation in future; • Understand the starting point for learners to literacy skills; • Understand the outcomes of the Foundation Phase Mobile Literacy Service to changes in teachers, learners, classrooms and learning, for those individuals benefitting from the service; • Gain insights to inform implementation; • Gain insights to inform enhanced reach and effectiveness.
GDE Education Research and Knowledge Management Directorate	<ul style="list-style-type: none"> • Identify outcomes and indicators to inform ongoing monitoring and future evaluations including a possible impact evaluation in future; • Document the Foundation Phase Mobile Literacy Service model; • Learn lessons from the Foundation Phase Mobile Literacy Service.

Users	Uses
GDE Strategic Partnerships Directorate	<ul style="list-style-type: none"> Communicate the achievements of the Foundation Phase Mobile Literacy Service to potential new funders.
Secondary users	
Potential new funders	<ul style="list-style-type: none"> Make funding decisions.
Provinces/ organisations implementing similar initiatives	<ul style="list-style-type: none"> Understand the Foundation Phase Mobile Literacy Service model; Learn lessons from the Foundation Phase Mobile Literacy Service.
Read to Lead	<ul style="list-style-type: none"> Gain feedback on the implementation and effectiveness of a key initiative contributing to the national Read to Lead campaign.

Evaluation criteria and questions

The evaluation should consider the **design, relevance, implementation, effectiveness², efficiency** and **sustainability** of the **Foundation Phase Literacy Mobile Library Service**.

The primary focus of the study should be at school level.

Evaluation questions are proposed, outlined below organised by theme. It is desirable to answer all of these questions. However, budget/cost should also be considered. The proposal should identify if any questions are significantly costlier than others to answer. Additional questions may also be proposed:

Clarification/design

- What is the programme theory for the **Foundation Phase Literacy Mobile Library Service**?
- What are the key outputs and expected/intended outcomes of the **Foundation Phase Literacy Mobile Library Service**?
- What key performance indicators should be used to assess the baseline and progress towards the attainment of key outputs and expected/intended outcomes for the **Foundation Phase Literacy Mobile Library Service**?

Relevance

- Is the **Foundation Phase Literacy Mobile Library Service** and its activities relevant given the provincial, district and local (i.e. in participating schools) context?

² The primary emphasis is on assessing the effectiveness of the Programme.

- Are the reading resources provided by the **Foundation Phase Literacy Mobile Library Service** suitable and relevant for teachers and learners (i.e. are there a variety of reading resources in relevant languages which are appropriately levelled for competency for the Foundation Phase (Gr R – 3))?

Implementation

- Has the **Foundation Phase Literacy Mobile Library Service** been implemented as planned?
- How many **schools, teachers** and **learners** have been reached? Are these in line with targets?
- Are the schools, teachers and learners reached aligned with selection/participation criteria?
- What services do schools, teachers and learners receive?
- Are school principals, Foundation Phase HoDs, teachers and learners satisfied with the services they receive?
- What is **working well** and should be maintained?
- What is **not working well** and should be improved?

Effectiveness/Efficiency

- Have the expected/intended short- and medium-term outcomes of the **Foundation Phase Literacy Mobile Library Service** been achieved in the first phase(s) of implementation (to December 2019)?
 - Are **Foundation Phase Literacy Mobile Library Service** resources being used in the classroom? How?
 - Are **Foundation Phase Literacy Mobile Library Service** resources being used to teach/develop literacy skills (print awareness, reading comprehension, phonemic awareness, vocabulary and spelling)? How?
 - Do teachers enjoy reading and are they reading for enjoyment?
 - Do learners enjoy reading and are they reading for enjoyment?
- Have there been any unintended outcomes (positive or negative) of the **Foundation Phase Literacy Mobile Library Service**? What are these?
- Is there value in extending the **Foundation Phase Literacy Mobile Library Service** to other schools/districts?

Sustainability

- Have sufficient measures been taken to ensure sustainability in terms of outcomes? What is recommended in this regard?

Optional addition, please cost this separately

Establishing the baseline for a future impact evaluation

- What are the current levels of reading and literacy skills amongst Foundation Phase learners in participating and non-participating schools?

Methodology

Potential service providers are invited to propose a methodology which will enable them to answer the evaluation questions outlined above in a cost-efficient and safe manner, given the current context.

Methods are likely to include:

- Programme document and data review;
- Key stakeholder interviews (**Foundation Phase Literacy Mobile Library Service** staff, provincial and district level GDE staff);
- Site visits and primary data collection including observation and interviews in a sample of schools.

Deliverables

The service provider will be expected to produce the following deliverables:

- Inception report (including evaluation approach/methods, sampling protocol, fieldwork plan and data analysis matrix);
- Data collection instruments;
- Fieldwork report, including a sampling report;
- Anonymised data, data including meta-data³;
- Draft and final versions of the evaluation report, including an executive summary, summary report and supporting information in annexures. The report should answer the evaluation questions and contain actionable recommendations.
- A validation workshop and presentations of the final report to stakeholders including the GDE (Curriculum Delivery and Implementation, Education Research and Knowledge Management and LS – LSTM Directorates) Department of Basic Education, Library and Information Association of South Africa, (School Library Interest Group), National Reading Coalition, district Library Facilitators and participating schools.

Evaluation timelines

It is expected that the evaluation service provider will be appointed and commence work in October 2020, clarification of the programme theory will take place in October/November 2020 and data collection will commence in February/March 2021. The draft evaluation report should be submitted in April 2021 and the evaluation should be completed by the end of May 2021.

Arrangements for managing the evaluation

The external evaluation team will be contracted by the GEDT and report to the GEDT Board of Trustees. Deliverables will be approved by the GEDT and the GDE Library Services Directorate. The evaluation will be supported by a task team comprising GDE Library Services officials which will provide input into draft deliverables and facilitate access to stakeholders as required.

³ Meta-data is also sometimes referred to as a data codebook.

Required competencies

The external evaluator should have the following competencies:

- Extensive knowledge of literacy development and education programming;
- Extensive knowledge of M&E approaches and methods including clarification, process, outcome and impact evaluation design and the development of M&E frameworks;
- Expertise in sampling, quantitative and qualitative data collection and analysis methods;
- A proven track record in conducting school-based research in Gauteng;
- Experience working with the GDE preferred;
- The ability to conduct research in Foundation Phase languages of learning and teaching in Gauteng;
- Excellent report writing and communication skills - the ability to produce concise, informative evaluation reports and actionable recommendations;
- The inclusion of emerging evaluators and/or evaluation companies is encouraged.

Structure and contents of proposal and budget

Interested parties should submit a proposal which contains the following components

- **Cover page** - Include basic information such as organisation name, address, website, project lead and contact information;
- **Executive summary** (1-page max) of proposal and topline budget figures;
- **Capacity statement:** A brief capacity statement (2-3 pages max), highlighting why your organisation is well positioned to conduct the evaluation. Indicate clearly whom the team leader will be. Attach short biographies/CVs of key personnel who will be actively involved in the evaluation in an appendix.
- **Proposed approach and methodology:** Some of the key information that should be included is: evaluation approach and design, sampling strategy and sample size, data collection methods, data analysis techniques, data visualization, reporting and presentation approach and overall project management approach. This should form the bulk of the proposal.
- **Proposed workplan:** with timeframes.
- **Budget:** Total budget required to conduct the evaluation in line with the proposed approach and methodology in South African Rand, with line item breakdown of costs and budget notes. The budget to be split by phase and key activity and clearly specify the following: Personnel including daily/hourly rates per staff member; travel costs; communication; copying and printing. An estimated ceiling of 60 working days should be taken into consideration.
- **References:** Names and contact information of three referees that will attest as to the quality of evaluation work previously conducted.
- One exemplar evaluation report to be attached as an Annexure.

Please note

- Proposals should not exceed 20 pages. CVs and reference documents can be included as annexures (exceeding the 20-page limit).
- Prices offered shall be all inclusive of all costs and shall remain fixed for the duration of the contract.

Proposal evaluation criteria

Proposals will be evaluated against the following non-exhaustive list of criteria:

- Technical quality of the proposal, inclusive of suitability of the M&E approach and design and methodology and presentation thereof: 40%;
- Relevant experience and appropriate qualifications of the service provider to execute the assignment: 30%
- Cost: 20%;
- BBEE: 10%.
- ***Preference will be given to service providers who partner with emerging evaluators and /or emerging evaluation companies***

Review and Timelines

- The GEDT with assistance from JET Education Services will evaluate all the proposals to come up with a shortlist.
- Note that if shortlisted, you may be required to make a presentation and/or provide additional information.
- Note that the GEDT reserves the right not to appoint any service provider.

Submission of the proposal

The proposals should be submitted in two formats:

- Two properly bound and numbered hard copies.
- Electronic copy.

Submissions and correspondences should be addressed to **Ms Kathy Tracey, Gauteng Education Development Trust, C/O JET Education Services, The Education Hub, 6 Blackwood Avenue, Parktown Johannesburg. 2193.**

Enquiries and electronic copies should be forwarded by email to ktracey@jet.org.za.

Closing Date: 12H00, Thursday, 22 October 2020.

References

CREST, (2014), *Post-Graduate Diploma in Monitoring and Evaluation Methods: General Principles and Paradigms of Evaluation Studies*. Stellenbosch: Centre for Research on Evaluation, Science and Technology, Stellenbosch University.

DBE, (2012), *National Guidelines for School Library and Information Services*, retrieved from: https://www.education.gov.za/Portals/0/Documents/Publications/NATIONAL%20GUIDELINES%20FOR%20SCHOOL%20LIBRARIES_small.pdf?ver=2015-01-30-081525-540

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