Integrated Education Program
The Systematic Method for Reading Success (SMRS) in South Africa: A Literacy Intervention Between EGRA Pre- and Post-Assessments

Lessons Learned from SMRS Mastery Tests and Teacher Performance Checklists

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Integrated Education Program

The Systematic Method for Reading Success (SMRS) in South Africa: A Literacy Intervention Between EGRA Pre- and Post-Assessments

Lessons Learned from SMRS Mastery Tests and Teacher Performance Checklists

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Prepared for
United States Agency for International Development

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The authors' views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.
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**Abbreviations and Glossary**

<table>
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<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tr>
<td>Book 1</td>
<td>first stage of SMRS, focused on learning letter-sounds, blending sounds into words and sight words needed to read simple stories, and developing comprehension and vocabulary through teacher read-alouds.</td>
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<tr>
<td>Book 2</td>
<td>second stage of SMRS, focused on reading leveled stories in trade books, learning spelling and writing skills, breaking words into syllables for easier reading, and learning how grammatical forms affect the meaning of words.</td>
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<tr>
<td>Choral responses</td>
<td>learners respond together to prevent embarrassment; accompanied by teacher-directed focus on the words to be read.</td>
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<td>Developmental</td>
<td>sequenced, to match learners’ abilities.</td>
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<td>DoE</td>
<td>[South African] Department of Education</td>
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<tr>
<td>EGRA</td>
<td>Early Grade Reading Assessment</td>
</tr>
<tr>
<td>HoDs</td>
<td>Heads of Departments [in schools]</td>
</tr>
<tr>
<td>IEP</td>
<td>Integrated Education Program</td>
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<tr>
<td>NGO</td>
<td>nongovernmental organization</td>
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<tr>
<td>NCS</td>
<td>National Curriculum Statement</td>
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<tr>
<td>LOLT</td>
<td>Language of Learning and Teaching</td>
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<td>MILL</td>
<td>Molteno Institute for Language and Literacy</td>
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<tr>
<td>PPC</td>
<td>Program Progression Chart; this essential component of SMRS guides teachers’ daily lesson preparation with specific content to include in each of the 7 steps.</td>
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<tr>
<td>Progressive</td>
<td>using letters and words that have been modeled and taught through leveled development stories just before reading them in new stories.</td>
</tr>
<tr>
<td>Development</td>
<td>stories just before reading them in new stories.</td>
</tr>
<tr>
<td>SMRS Team</td>
<td>consultant, Dr. Sandra Hollingsworth; 9 members of DoE at national and provincial levels; 7 members of MILL; the team was responsible for materials development, implementation, and assessment phases of SMRS.</td>
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<tr>
<td>Read-alouds</td>
<td>stories teachers read to children to help them learn the joy of reading along with comprehension and vocabulary skills.</td>
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<td>RTI</td>
<td>RTI International (trade name of Research Triangle Institute)</td>
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<td>QIDS-UP</td>
<td>Quality Improvement, Development, Support, and Upliftment Programme</td>
</tr>
<tr>
<td>Scripted-format Teacher’s Manual</td>
<td>manual with detailed, exact directions on what the teacher should say and do, along with what learners are expected to say and do.</td>
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*The Systematic Method for Reading Success (SMRS) in South Africa*
SGB  school governing body
SMRS  Systematic Method for Reading Success
Teacher Performance Checklist (TPC)  a rating scale to inform teachers, supervisors, and program development; teachers are evaluated on each step of the SMRS Checklist according to the percentage of the step requirements they fulfill; scores range from 0% to 100%
trade books  fiction and nonfiction books published for a general readership rather than as curriculum materials; used for supplemental reading
USAID  United States Agency for International Development
I. Contextual Background: How SMRS Became the Instructional Intervention for the Integrated Education Program

In close collaboration with the South African Department of Education, RTI International (RTI) led the Integrated Education Program (IEP), funded by the U.S. Agency for International Development (USAID)/Southern Africa from 2004 through 2009. Included in IEP was initial technical assistance to the Department of Education (DOE) on a form of assessment of reading skills known as the Early Grade Reading Assessment (EGRA), which the DOE subsequently developed for use in South Africa and implemented on a pilot basis. Dr. Sibusiso Sithole, Chief Director: Quality Assurance and Promotion, South African Department of Education, reported at a USAID meeting in June 2009 that results of EGRA and other tests in South Africa have shown that:

- learners are not able to read at their grade level;
- learners perform lower than their counterparts in many other countries in Africa

Dr. Sithole then spoke about the reasons for literacy failure in South Africa, relating to the following:

- School governing bodies (SGBs) have the authority to determine their schools’ language policies
- Many SGBs decide to use English as their Language of Learning and Teaching (LOLT)
- Many teachers are not able to communicate well in English
- Most learners choose to study non-African languages beginning in grade 12—thereby limiting the pool of future African-language teachers
- Most universities do not have Foundation Phase (grades R-3) teacher training programs; few offer African-language programs
- Few teachers willingly choose to teach in Foundation Phase
- Initial and continuing teacher training programs do not focus on teaching reading
- Teachers are often not equipped to teach reading in any language, but particularly in African languages

In late September 2008, at the request of the Department of Education, IEP funded the participation of two international experts in early grade reading for the Foundations of Learning conference organized by the national DoE. In response to the work presented at the conference, the DoE requested IEP support to pilot an easy-to-use early grade reading program, which had proven highly successful in Mali and Niger, to help first graders read well at their grade level in their mother tongue. SMRS was selected for the intervention pilot because through it reading is taught in home
languages, it was designed for teachers who did not know how to teach reading, and the program had shown success in other African countries (see Gerard, 2008; Mitton, 2008) and in Haiti (Allen, 2008).

The piloting of SMRS was funded by USAID/Southern Africa and implemented under IEP in close partnership with the Department of Education. Dr. Sandra Hollingsworth, University of California, Berkeley, was the consultant responsible for guiding the development and implementation of SMRS, and the Molteno Institute for Language and Literacy (MILL) was the organization appointed as the service provider responsible for day-to-day coordination and implementation. Three national DOE officials and six provincial officials formed part of the SMRS material development, implementation, and assessment team.

II. Research Design/Methodology

1. Hypotheses

The Department of Education was interested to see if:

- the SMRS mother-tongue early literacy methodology would be of use in South African schools;
- developing home-language materials for and training in SMRS for teachers and supervisors would improve the teaching of reading so that learners would learn to read 30 words per minute (wpm) with good comprehension after 20 lessons; and
- SMRS schools (treatment schools) would significantly outperform comparable control schools.

2. Timeline

The timelines to develop, implement, and assess SMRS in other countries have been from 9 to 12 months. Because of time and funding limitations, however, South African schools had less than 6 months for the total pilot.

The time limitation for the intervention was related to a contractual requirement between USAID and RTI, as IEP was to close out in June 2009. Thus, the timeframe of 5 months was not related to pedagogical issues. If the SMRS pilot could have run for a further 3 months, it would have allowed more time for the teachers to become more skilled in the methodology.

3. Program Components

The total pilot of SMRS included overlapping phases:

- Phase 1: Materials Development—Learner Stories, Program Progression Chart (see Figure 4 below), Vowel and Alphabet Chart, Teacher’s Manual, and Mastery Tests (including continuous revision based on field data). The total SMRS materials development period ran from early December 2008 to mid-June 2009. Some initial materials development took place in December 2008 and the first

- Phase 2: Training for Teachers and Supervisors—Teachers and supervising facilitators attended two 4- to 5-day workshops to learn the program. Training for Book 1 (see glossary for a description) occurred February 9–13, 2009 (20 supervisors) and February 15–20 (48 teachers, 16 supervisors). Training for Book 2 (see glossary for a description) occurred April 6–10, 2009 (16 supervisors), and April 15–20 (48 teachers, 16 supervisors). The format of the first workshop was demonstration and then practice for each of Book 1’s seven steps. The format of the second workshop was reflection on Mastery Test data and development of action plans to strengthen the teachers’ instructional weaknesses.

It was apparent from Book 1 monitoring visits (see Teacher Performance Checklists [TPCs] under Section II.5 below, and Appendix A) that teachers needed more time to assimilate, understand, and complete Book 1 (see Glossary for a description). Thus, the teacher training assigned to Book 2 was adapted to become a combination of a Book 1 refresher training and an introduction to the initial activities of Book 2. Some elements of Book 2 were therefore left out.

- Phase 3: Program Implementation—February 26–May 29, 2009 (less 15 days off for holidays and 26 days for weekends).

- Phase 4: Classroom Observations Using Teacher Performance Checklists—February 26–May 29, 2009, to inform both professional and materials development.

- Phase 5: Assessment (see below for more on this phase).

4. Sample

The Department of Education selected the provinces of Limpopo, Mpumalanga, and North West Province because of different mother-tongue Language of Learning and Teaching (LOLT). The sample included predominant home languages in Limpopo (Sepedi), Mpumalanga (Zulu), and North West (Setswana) provinces.

The Department also chose a sample of schools within those provinces for the implementation of the pilot (10 treatment schools and 5 control schools in each province). Both treatment and control schools were randomly selected from schools in particular districts that were already involved in a national improvement intervention, the Quality Improvement, Development, Support, and Upliftment Programme (QIDS-UP). As part of QIDS-UP, these schools each received from the DOE a Reading Toolkit—a large but portable metal cabinet holding teaching and learning materials—from which materials could be used in support of SMRS at Book 2 phase. From the sampled schools, all Grade 1 teachers were included in the baseline assessment, for initial totals of 52 (project) and 26 (control) teachers. Due to the withdrawing of several schools and illness, the numbers of teachers who remained at the post-test was 48 (project) and 26 (control).
For assessment purposes, learners within each grade 1 classroom in the selected schools were randomly selected. The total numbers of learners who participated in EGRA pre-testing were: Limpopo, 210; Mpumalanga, 190; North West, 250—for a total of 650 learners, of which 200 were from control schools (see Piper, 2009). Both teachers and learners were assigned codes for privacy in reporting. Codes included province (e.g., L, M or N), schools (T or C, 01–10), teachers (typically A–B), and learners (01–20).

5. Assessment

The research design to study the SMRS pilot in South Africa involved several levels of assessment.

Baseline (January 26–30) and post-intervention assessment (June 4–11) data were collected using the EGRA tool. The tool was developed by RTI under the USAID EdData II contract and has been used in more than 30 countries to date. The South African version of the tool had been previously trialed by the DoE in a number of the 11 official languages and comprises four subtests: letter sound recognition, word reading, text reading fluency, and text comprehension.

SMRS Teacher Performance Checklists were developed so that teachers and their supervising facilitators could check after every 10th lesson to see that the program was being implemented correctly. The checklists were developed based on the steps in the program and teachers could receive from 0% to 100% implementation scores. Facilitators were to help teachers strengthen areas of weakness identified. Feedback from these observational instruments (four applications in each province) was also used to revise the program to make it easier for teachers to implement. All members of the SMRS team utilized these instruments. Reliability among testers was gauged by comparing their TPC scores with those of Dr. Hollingsworth.

Learners were assessed through Mastery Tests after every 10 lessons to see if they had mastered the SMRS materials taught to date, including recognizing letter sounds, blending sounds to recognize words, reading developmentally leveled stories using the letters and words taught, and answering comprehension questions about the stories. Teachers and facilitators then used this information to improve program implementation.

III. Introduction to SMRS

The Systematic Method for Reading Success is a fast-track reading program developed around robust findings from research on learning to read (National Reading Panel, 2001). To read well in any language, learners should begin in their home languages or mother tongues, learn how to decode sounds into letters and words, and learn to read fluently with expression, with the goal of learning how to comprehend what they read. Although piloted in South Africa in grade 1, SMRS can be used with learners of any age. After learners are successful readers in their home languages, they can learn to read in national languages.
SMRS assumes that the best way to motivate lifelong reading is to ensure that learners are successful and excited as they learn the reading process. The major idea here is that the learners read successfully from the first day of school, in their home languages, using their names as their first sight words. They soon go home able to read a story and knowing that they are readers! They gradually build up knowledge of letter sounds, blending sounds into words, recognizing sight words, and understanding what they read so that they NEVER fail when learning to read. Words that they have not yet learned are presented as pictures. Teachers are guided on which letters, decodable words, sight words, read-alouds, and independently read stories to use in each lesson through an SMRS Program Progression Chart (PPC) (see Section IV below).

Local teams in each country create PPCs according to the structure of the home languages. Two books are required, with a total of approximately 55 lessons. In most languages, the first book uses only single-syllable words and the lessons take 30 minutes. The second book uses multisyllabic words and includes exercises to write brief stories; trade books are used as reading supplements. Because of the limited time period for the South Africa pilot, only 45 lessons were developed for isiZulu, Sepedi, and Setswana. Also, due to the linguistic structure of isiZulu, its SMRS lessons are slightly different from the other two.

Local teams develop progressively leveled stories\(^1\) for the first 25 lessons using the words introduced through the Program Progression Chart. The teams also develop teacher read-aloud stories with comprehension and vocabulary questions. The stories are about learners’ own cultures and environments, for familiarity, motivation, and pride (see Appendix B: Materials Development Overview, South Africa).

The program is designed in a scripted format in a Teacher’s Manual so that teachers with little preparation in reading instruction can teach it (see Appendix C: Example of SMRS Teacher’s Manual Script for Step 4—in English).

SMRS is meant to be a supplementary introduction to a full literacy program in learners’ home languages. That is, it can easily become a 30- to 45-minute addition to the regular curriculum. At the end of the 45 lessons of SMRS, learners are competent enough to read any grade appropriate materials. Thereafter, the 30 minutes used for SMRS lessons should go to richer literacy instruction and informational reading. After a year of practice in their home languages, learners can begin to transition to other languages successfully (e.g., English in South Africa).

### IV. Analyses of the Mastery Test Data

#### 1. Overall Success on Mastery Tests

Implementation of SMRS resulted in improved literacy skills for over 90% of learners based on Mastery Test data. Results on the final test by class ranged from 0 (baseline).

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\(^1\) Level 1 Stories (1–2 short sentences per page; 1 paragraph); Level 2 Stories (3–4 sentences or 2 longer sentences; less than 3 paragraphs); Level 3 Stories (5–8 sentences or 4 longer sentences; conceptually difficult; 3 or more paragraphs); Level 4 Stories (multiple sentences and paragraphs, conceptually complex).
to 80 words per minute (wpm; see Figures 1, 2, and 3). These results were not surprising to the program developers. Based on results in other countries (Allen, 2008; Gerard, 2008; & Mitton, 2008), we would expect 90% of the learners in South Africa to be reading at least 20–30 correct wpm with good comprehension in their appropriate levels at the end of 20 lessons. That level of success was clearly demonstrated through the three Mastery Tests administered. At the end of all 45 lessons we would expect 90% of learners to be reading at least 45–60 wpm with good comprehension. Because all those lessons were not completed in South Africa, we cannot reasonably expect full levels of success at this point in the program. The fact that less than 50% of the program was complete when the EGRA post-intervention assessment was administered must be considered in any analysis of results.

Figure 1. North West Province—Class Averages on Final Mastery Test (wpm)

Legend:
NT = North West Province, Treatment
WPM = words per minute
2. Why These Results? Issues Impacting Implementation

While many teachers and learners progressed well, some had difficulty. What factors led to improvements on Mastery Test results, and what factors were detrimental?
The Systematic Method for Reading Success (SMRS) in South Africa

a. The Systematic Nature of the Program

That SMRS is a planned developmental system is the biggest difference between it and traditional reading programs. Teachers developed lessons from the framework of the SMRS Program Progression Chart (PPC) to teach and have learners practice the following skills every day: phonemic awareness, the most important letter sounds that are decodable into words, repetition of frequently appearing words on sight, listening comprehension through oral questioning, guided reading of stories, and independent reading at the successful level of each learner. Figure 4 provides an example of the developmental and systematic nature of SMRS, a PPC excerpt from Book 1. It details, for example, why the sounds of “m” and “e” need to be introduced before learners could be expected to decode the word “me.” Learners cannot read the story “I can run. You can run. Men can run. Tom cannot run (picture of Tom falling). We can run (pictures of others helping Tom get up, picture of all running).” unless they have been taught how to decode and recognize the words in the story. While this example is in English, the charts for this intervention in South Africa were in the target languages: isiZulu, Sepedi, and Setswana.

Figure 4. Book 1 Program Progression Chart (English)

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<tbody>
<tr>
<td>1</td>
<td>N</td>
<td>6 min</td>
<td>1 min</td>
<td>2 min</td>
<td>3 min</td>
<td>3 min</td>
<td>5 min</td>
<td>10 min</td>
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<tr>
<td>2</td>
<td>R</td>
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**TEST 1:** (Lessons 1-10)

1. Letter sounds: m e s n o t a f (6 out of 8 needed to pass)
2. Decoding: me see, men to no not Tom man mat Tam fan fat met (10/13)
3. Sight words: [Child’s name] I see run can you go down up (7/9)
4. Read and answer questions for Story 10, at least 10–15 wpm (20–30 for Test 2, 30–45 for Test 3), with good comprehension

Teachers and supervisors learned the basics of SMRS at a first training workshop at the Alpha Center, North West Province, February 9–13.
b. Mastery Tests

As noted, learners were assessed after approximately every 10 lessons on Mastery Tests (see the gray portion at the bottom of Figure 4 as an example) so that teachers could see where learners were making progress or needed extra support.

At the second training workshop in Roode Vallei Lodge, Gauteng (March 2–6, 2009), which was funded by the Department of Education, the SMRS team began with provincial small group discussions on the second set of learner Mastery Tests (the first was the baseline). Most teachers were surprised that their learners were performing poorly. The SMRS team followed that reflection with daily demonstrations of how the teachers could progress in each step of the program and had them prepare and revise action plans. The facilitators all agreed that those activities led to better teacher and learner performance through May, when the third Mastery Tests were administered. More self-reflective practice using a teacher-administered Mastery Tests is recommended for a full rollout of SMRS (see Section VIII, Summary and Recommendations).

c. Program Routines

The techniques that were taught for improving reading instruction emphasized classroom routines. That is, each step had a simple format that was easy for teachers and learners to follow. For example, teachers used a “my turn,” “your turn” routine to ensure success on new letters and words. They were taught not to model familiar letters and words—as a way to encourage learners to explore first—and to use a random approach to prevent learners from memorizing. That is, instead of asking learners to read words from a lesson or lessons in order, teachers were to randomly point to words so that learners would have to focus on the words and read them correctly, then give their meanings and/or use them in a sentence.

However, it became apparent that one of the program routines—having learners reply chorally in Steps 2–5—also worked to the disadvantage of the program. The intent of that procedure was to prevent embarrassment of learners being called on to read, when they could not; and to encourage teachers not to single out learners making errors. When teachers heard an error, they were to stop and model again. The slower learners would benefit from the repetition IF the teacher directed the learners’ attention to the print in question.

Because the “call and response” routine was familiar to the teachers, however, it was very difficult for most of them to pay attention to individual learner errors. Some teachers forgot to ask learners to read words at random. Many forgot to ask the meaning of words, since that was not part of their “memorize and recite” tradition. Additionally, unless corrected by a facilitator, many of them tended to allow choral reading during Steps 1 and 7, when learners were supposed to be reading independently at different levels.

We are recommending a different approach for rollout of the program to correct these issues (see Summary and Recommendations below).
d. **Thirty-Minute Lesson Guideline**

As mentioned earlier, SMRS is meant to be a supplementary introduction to a full literacy program. That is, it can easily become a 30- to 45-minute addition to the regular curriculum. Once the learners are reading and writing through SMRS, that time should go to richer literacy instruction and informational reading in grade 1.

In an attempt to model “approximate time lengths” for each step (for example 16 minutes of actual reading in Steps 1 and 7, as opposed to 3 minutes spent on Steps 2 and 3 (phonemic awareness and letter sounds), we set an approximate time length for each lesson of 30 minutes (see PPC example in Figure 4.) Teachers and many facilitators ignored those guidelines, and could not confine the lesson to 30 minutes. Sometimes they enjoyed Steps 2 and 3 so much that they spent 15 minutes on them, and then cut short the actual reading time. Or, after learning in the second workshop that they could take more than 30 minutes if needed, they stopped completing the read-alouds (Step 6) to save time for more skill-based steps.

Whether the lesson should take 30 or 45 minutes is an issue that obviously was not adequately explained. The idea is that the choral skill steps stay short to prevent memorization and to allow most of the time to be spent on reading. This issue would also need to be addressed in rollout (see Summary and Recommendations).

3. **Issues of Monitoring and Support: The Teacher Performance Checklist**

a. **Observation and Support of Teachers**

One part of implementation that proved almost universally constructive was feedback to teachers specific to each step of the reading instruction. This inevitably contributed to the improvement noted above, that 90% of learners across all provinces improved in wpm after only 15 weeks of instruction, and is discussed further below.

b. **When Facilitators Supported Teachers, Learners Progressed**

Although certainly facilitator support was not the only variable affecting teacher performance, where facilitators gave the support as needed on the Teacher Performance Checklist (see Appendix A), teachers and learners tended to improve, according to Dr. Hollingsworth and evidenced by observations at the second training workshop and subsequently in the classroom. During the second workshop, Dr. Hollingsworth observed teachers continuing to stay on one progression step for a very long time, repeating and repeating words, which leads to memorization rather than reading. To rectify the problem, she worked with SMRS facilitators to help them to interrupt this practice and by the final set of classroom observations in May 2009, Dr. Hollingsworth observed an improvement. Facilitators attributed this change to techniques, including reviewing a lesson step by step with a teacher after observation using the TPC, which they employed and then shared with other facilitators in follow-up meetings.
c. Continuation of Pre-Training Practices

When facilitators failed to notice and correct teachers’ performance issues, or teachers did not understand or apply correct routines, former practices—such as rote memory and recitation—continued. As mentioned above, teachers (and perhaps the facilitators) had a hard time distinguishing between collective but focused choral responses, as SMRS requires, and rote memorized recitation, which was their prior practice. Other causes may rest with the varying capacities of the teachers, and whether there was school-level collaboration beyond the facilitators’ visits.²

d. Collaborative Partnerships

The highly collaborative partnership between the Department of Education (national to school) and the Molteno Institute for Language and Literacy facilitated the SMRS team’s entrance into the schools and, in most cases, consistent program messages. Based on results from other countries, the results would have been much less significant had the DoE not been involved.

V. Using Mastery Test Data and Teacher Performance Checklists to Look Deeper into EGRA Results in Mpumalanga

By province, the SMRS team randomly sampled 10 learners out of each grade 1 class. In schools with more than one grade 1 teacher, a maximum of 20 learners was sampled, often by sampling an even percentage of learners from each classroom. Our research design allowed us to estimate the average impact of the SMRS method on learner achievement by comparing scores on the baseline and post-intervention assessment.

As noted in the methodology section (II.4), the EGRA baseline assessment sample was distributed as follows (including learners in both control and treatment):

- Limpopo Province – 210
- North West Province – 250
- Mpumalanga Province – 190

1. Sampling Issues: Sustainability and Program Performance

The baseline assessment’s random sample of just 650 learners in three provinces led to some sampling issues regarding sustainability and program performance. The school, teacher, and learner sampling procedures were thwarted by obstacles such as frequent learner/teacher absences, learners transferred in and out of treatment schools, one Mpumalanga school that was dropped because the language of instruction turned out to be English, and another school in Mpumalanga that withdrew from the program.

² To note, this point has engendered some interesting and unfinished debate within the SMRS team as to the relationship between facilitator input and teacher performance.
because of teacher discontent with it. (Before they withdrew, Mastery Test results showed that they had no learner gains between the first and second tests, and that teacher performance in implementing the program was inadequate).

2. SMRS Team Performance: DoE Provincial Monitors in Mpumalanga

As occurred in the other two provinces, the Mpumalanga DoE provided several departmental staff as SMRS team members. In Mpumalanga, these individuals were “randomly” selected after a fashion, since they did not regularly work in the district where SMRS schools were located. Their involvement might have had an impact on results in that province, as they were diligently adhering to the DoE’s “official” timetables for literacy, discouraging teachers from taking longer than 30 minutes for SMRS and asserting the necessity of doing other activities (even though the timetables had been amended for SMRS by Dr. Sithole at each of the two training sessions that these provincial monitors attended). On occasion these Departmental officials also prevented other SMRS team members from supporting teachers and administering Mastery Tests to learners in their classrooms. Frequently, they did not participate in the SMRS team as planned.

3. Language of Instruction

In Mpumulanga, only 82 learners were available for the third Mastery Test, and only 20 out of 82 spoke isiZulu, the language of instruction, as a mother tongue. Most were isiNdebele speakers. This finding was quite different from what had been intended during program design (see also Section VI.4 below). SMRS is not designed as a second-language reading program. Therefore, even though isiNdebele is very close to isiZulu, learners who speak languages other than IsiZulu will have more difficulty learning to read in isiZulu.

4. Under-Age/Capacity-Limited Learners

As determined by SMRS team members, approximately 15% of the learners in the sample were under-age or capacity limited—that is, they began attending school at 5 years of age or even younger and/or were developmentally disabled. Facilitators could not tell accurate ages through official records, but younger, less able learners tended to be grouped in one part of the classroom and could not read, so they were easy to count. Those learners may have contributed to the lack of progress in terms of the classrooms’ average scores. Again, the continuation of the program through December 2009 might show stronger progress as the under-age learners develop.

5. Greater Chance of Significant Issues with Capacity, Language, and Performance in Mpumalanga

While all provinces had difficulty with changing teachers’ perceptions and practice of literacy from rote memory exercises, it was compounded in Mpumalanga. Figure 5 shows results from a learner who could read less than seven words correct per minute, but could respond correctly to 62.5% of the comprehension questions. This example clearly shows that the learner had memorized the story rather than “read” it.
Because of the greater overall problems in Mpumalanga, the selection of 10 random learners in a classroom meant that each had a greater chance of significant issues with capacity, language, or performance. Given this, it is inconsistent that in Figure 6, the comprehension score (CO) for learners of this particular teacher (MT03A) was high relative to the other basic literacy scores: letter-sound (LS), decoding or word recognition (DEC), words recognized on sight (SW), and words read correctly per minute (WPM). Thus, Figure 6 shows that teacher MT03A’s learners were able to answer the comprehension questions because they had memorized the stories and were able to “read” the pictograms in the sentences as compensation for basic literacy skills. Correspondingly, the teacher performance score in this sample school was very low, less than 25%.
Figure 6. The Impact of Instructional Performance on Teacher MT03A’s Learners

Legend:
CO = comprehension

Note: Except for WPM, data collected for items on the x axis have been converted to percentage scores for comparison purposes.

6. Difficulty of the isiZulu Language

Finally, many of the SMRS team wondered if the relatively poorer performance in Mpumalanga had something to do with the difficulty of the isiZulu language itself. It should be noted, however, that one Mpumalanga teacher—MT05A—had a superior performance score (82%) and her learners made adequate progress (discussed in Section VII.2 below).

VI. Issues of Program Completion

1. Step 7 Success

When everyone met for the second training at Roode Vallei Lodge (March 2–6), we found that at Step 7, teachers were keeping all learners reading the same story regardless of whether they could read it successfully or not. For example, if the lesson taught contained Story 16 (a Level 3 story), they expected all their children to be reading Story 16, whether they could read it successfully or not.
2. **Teachers Repeating Earlier Lessons**

Once the SMRS team had clarified that Step 7 is the time for learners to read stories on their own levels with good comprehension, and Step 1 is the time to reread familiar stories with excellent comprehension, teachers stopped the practice of dropping back to Level 1 stories (1–5) so that children could read successfully. Others noted that they had dropped back to Level 1 because new learners joined their classes. That meant repeating many lessons rather than progressing. Although it might be appropriate in many classrooms, this dropping back meant that only eight of 48 teachers got past Lesson 25 (out of 45 lessons), and on average teachers were on Story 21 by post-assessment.

3. **Completing the 45 Lessons**

The fact that few teachers completed all 45 lessons does not reflect a weakness of the program, however. As discussed above, the requirement to post-assess the project-in-progress (Lesson 21) in June 2009, rather than at the end of the program (Lesson 45), was an administrative rather than a pedagogical decision. While the teachers plan to continue the program, we estimate that most will not complete both Books 1 and 2 of the program until November 2009.

4. **General Issues of Language**

As it turned out, assumptions made about languages of instruction could have resulted in all three provinces being unable to complete the program. When the learners were randomly sampled for the EGRA baseline, it was with the understanding that the Mpumalanga teachers and learners spoke isiZulu, North West Province learners and teachers spoke Setswana, and Limpopo learners and teachers spoke Sepedi. This proved incorrect. Whilst the majority did speak these target languages in the relevant provinces, there was a mixture of languages spoken in all three provinces as follows:

- Sepedi
- Xitsonga
- Tshivenda
- Isindebele
- isiZulu
- isiXhosa
- SiSwati
- Sessotho
- Setswana

VII. **Challenges of Implementation**

1. **Limited Time and Funding Constraints**

As mentioned earlier, while planning and preparation for the SMRS pilot occurred at the end of 2008, implementation was not possible until the beginning of the school year, in January 2009. With only six months remaining on the IEP contract (during
which national elections took place in South Africa), and the limited funds available, SMRS was able to accomplish all that it set out to do due to the hard work and commitment of Dr. Hollingsworth, MILL, and the DoE, supported by RTI—but, naturally, not always with the level of refinement and care that would have been achieved over a longer time period and with more funding.

2. Traditional Conceptions of Literacy

Teachers had from 16 to 37 years of experience and understanding that literacy should be taught through rote memory and recitation. Most teachers had no concept of literacy as reading for meaning, or as reading ever more complex materials. The example in Figure 7 of teacher MT05A shows that Level 2 and 3 learners moved up appropriately (that is, the relationship between WPM and Comprehension progressed in sequence: Level 2: 19 WPM and 36% comprehension; Level 3: 26 WPM and 40% comprehension). On the other hand, Level 1 learners were left too long on Level 1 and were not advanced to more difficult levels, resulting in memorization (the combination of 13 WPM and 50% comprehension clearly reflects memorization). Because learners were not progressing through the levels appropriately, as revealed in the Mastery Tests, the post-intervention EGRA results also were affected.

Figure 7. Appropriate Leveling (Except Level 1) in Teacher MT05A’s Classroom

Legend:
CO = comprehension (%)
LV = reading level
WPM = number of words per minute (actual)

3. Refinement of Materials

The leveled stories written for the first 25 lessons were successfully produced for this effort in a very short time and are proving to be a very effective resource. However, they were hurriedly developed and any extension of the SMRS program would benefit from a review and refinement of some elements of the materials. The SMRS team changed the training program materials while the intervention was in progress, to respond to teachers’ perceived needs and to become clearer and more productive as...
we went along. However, that “action research” nature of the implementation confused many teachers.

4. Three Languages at Once

Beginning SMRS with three languages at once would not be recommended again; doing so introduces more variables than can be successfully tracked in a pilot effort. In other countries, SMRS materials were at first prepared for just one language due to the time required to create, pilot, and revise the materials, and then implement and evaluate the program. After the pilot showed positive results, the program would be expanded to include more languages.

5. Prohibition of Taking Books Home

Not allowing children to take the school’s books home is a long-standing tradition that is hard to interrupt. Teachers were anxious that the books would get lost or torn and so were reluctant to comply with this important aspect of the program. When teachers refused to send books home, their learners had limited practice opportunities.

6. “Saving” the Trade Books for SMRS “for Later”

Under this pilot, a range of trade books from Levels 1 through 4 was provided to every teacher in addition to the SMRS storybooks so that learners who had read the program stories could continue practicing and advancing. In most cases, however, when facilitators visited schools, it appeared that these books were not being used. Some teachers insisted on saving the trade books “for later” even though learners could read them. This decreased possibly strong results.

7. Recognizing Readiness to Advance

Some teachers had difficulty recognizing when learners had the decoding and sight-word skills to read more difficult material. They therefore failed to let those learners progress through more complex levels. As indicated in Figure 8, the high scores in decoding and sight-word skills indicated that teacher LT07B’s learners could read Level 3 stories, but the teacher had them practice only in Levels 1 and 2 (Stories 1–10). Therefore, they never had the opportunity to progress to the level at which they were finally tested (Story 20). This teacher’s performance score (percentage of program implemented) was only 60%.
Figure 8. **Missed Opportunity: Learners with Strong Letter Sound and Sight-Word Recognition Should Have Been Moved to Higher Levels**

Test 3, Story 20, LT07B

<table>
<thead>
<tr>
<th>Students Held in Levels 1 &amp; 2 (six learners)</th>
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</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>WPM</td>
</tr>
</tbody>
</table>

Legend:  
CO = comprehension (%)  
LS = letter-sound recognition (%)  
WPM = words per minute (actual)

Note: Except for WPM, results by component have been converted to percentage scores for comparison purposes.

**VIII. Summary and Recommendations**

In summary, despite all efforts to prevent it, SMRS was differently implemented and achieved different results across both classrooms and provinces. Certainly we would expect some deviation among teachers, but ideally, more coherent and positive results were the goal. The fact that on the whole, learners and teachers alike made so much progress with less than half of the lessons completed, however, says a lot for the strength of SMRS, even with all the difficulties of implementation (see also Piper’s *IEP impact study of SMRS using Early Grade Reading Assessment in three provinces in South Africa*).

To repeat the opening sentence in Section V.1 of this report, “Implementation of these techniques resulted in improved literacy skills for over 90% of learners…” Based on these successful findings, and the benefit that would be derived from continuing this approach in South Africa at least until the conclusion of 45 lessons, below are specific recommendations for addressing program challenges as the DoE moves forward with SMRS in South Africa.

1. **The DoE should support the intervention in SMRS pilot classrooms, through Book 2, until the end of 2009.** This is necessary to maximize benefit of investment so far and to fully utilize SMRS materials have already been created and are very cost effective; the supervising facilitators have already been trained;
teachers have had much experience so far; and the cost of the continuation should be limited.

From the analyses of the Teacher Performance Checklists, the SMRS team has learned that changing embedded practices takes time and patience (more than two 5-day workshops). It is recommended that a third workshop be scheduled as soon as possible, to refresh and support proper implementation of SMRS. In addition to Dr. Hollingsworth, MILL and DoE staff, and teachers, school principals and HoDs should also be encouraged to attend. A change in supporting officials in Mpumalanga Province should also be considered. The issues to be addressed at the third workshop should include:

a. Encouraging learners to take books home.
b. Retraining teachers for Book 2 activities (spelling, grammar, writing).
c. Emphasizing reading for comprehension and pleasure.
d. Clarifying focused and random choral responses from traditional instructional techniques that teach rote memorization.
e. Adding a digraph/trigraph chart (to teach with alphabet).
f. Moving learners up through reading levels.
g. The need for substantially more practice in using the TPC for observing and supporting teachers in their classrooms.

2. Reduce support visits from Molteno/DoE from bimonthly to monthly support visits to participating schools and classrooms.

3. Support a second cohort of 10 additional schools in each province for 2010.
   To accomplish this and improve the results so far, these changes for SMRS are recommended and should be supported in late 2009.
   a. Revise the learner stories in Book 1 so that they are even more developmentally appropriate.
   b. Revise the teacher read-aloud stories to be shorter and more manageable for teachers.
   c. Introduce a small group-work strategy rather than whole class for independent reading and writing (a component added in Book 2).
   d. Develop and teach teachers to administer and use their own Mastery Tests.
   e. Extend time for SMRS to 45–60 minutes per day, since it covers the reading and writing milestones established by the South African Department of Education (NCS).
   f. Extend the program even further, to other schools in the focus provinces and other provinces through DoE funding and support from the European Union.
   g. Extend SMRS to other grades in the Foundation Phase.
h. Use EGRA as part of annual national assessments to monitor reading skills in the lower grades.

i. Use SMRS as part of a DoE strategy to “sell” mother-tongue teaching in the early grades.

j. Use SMRS in initial and continuing teacher development programs as an effective approach to teaching reading.
IX. References


Appendix A: Teacher Performance Checklist

Province: ………………………… Teacher: ………………………
District/Region: ………………………… Observer: …………………………
School: ………………………… Date: …………………………
Total Number of Learners: ……… Present: ____ Absent: ____

Before you begin
Which lesson did you observe? __________
Which steps? _______

| Coding Scale |
|---------------|---|---|---|---|---|
| How well did the teacher follow the method according to the Teacher’s Guide? |
| Very well | Well | Average | Below Average | Not Observed |
| 4 | 3 | 2 | 1 | 0 |

General Remarks (to be added at the end of the lesson) 4 3 2 1 0 Remarks
1. Lesson materials prepared before the class began?
2. Focused learners’ attention on the exact word read on the board?
3. Did not allow learners to read more than the target word or picture?
4. Used appropriate hand gestures?
5. Heard when the learners make mistakes and correct them according to the routines?
6. Stuck to the script (limited teacher talk; most time learners read stories)?
7. Did not “overmodel” and lead learners to memorize?
8. Paced the lesson, not too slowly, not too fast?
9. Asked for group response, rather than call on raised hands?
10. Ensured that learners were NOT reading chorally in Steps 1 and 7?
11. Taught the programme with enthusiasm?

Step 1: Rereading a Familiar Story 4 3 2 1 0
12. Monitor: Made sure learners were reading left-to-right on correct page?
Helped the learners draw a finger under each word and point to the pictures?
13. Spent only 1 minute (or less) teacher talk, 5 mins. for learners to read?
Lesson Time (6 min) Begin : Finish : Total :

Step 2: Phonemic Awareness (Words are made up of sounds) 4 3 2 1 0
14. Modeled new sounds according to the routine (1st and 2nd sounds of syllable)?
15. Reviewed previous sounds without modeling, asking for 1st and 2nd sounds?
16. Encouraged learners to manipulate sounds according to the routine, letting them think what the 1st and 2nd sounds are without telling them?
17. When heard an error, stopped and modeled again ONCE?
Lesson Time (1 min) Begin : Finish : Total :

Step 3: Phonics (letter sounds) 4 3 2 1 0
18. Asked for the sound(s) of new letter(s) after modeling (slowly and quickly)?
19. Asked for new and review sounds, S and Q, then mixed once or twice?
20. Ensured that the learners were looking at the letter on the board?
<table>
<thead>
<tr>
<th>Step 4: Decoding (Blending letter sounds into words)</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>23. Moved finger under the letters to blend the sounds of each letter of the word slowly, then quickly?</td>
<td></td>
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<tr>
<td>24. Remembered to model new words, but NOT to model review words?</td>
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<tr>
<td>25. “Play”: Prolonged the sounds of each letters separately to get learners’ attention?</td>
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<tr>
<td>26. Remembered to ask the learners the meaning of the words?</td>
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<tr>
<td>27. When heard an error, stopped and modeled again ONCE?</td>
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<tr>
<td>28. Mixed the new and review words once or twice to prevent memorization?</td>
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<table>
<thead>
<tr>
<th>Step 5: (IsiZulu): Sight Prefixes/Suffixes (reading syllables on sight)</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
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</thead>
<tbody>
<tr>
<td>29. Read the syllable as a whole quickly, did not separate into letter sounds?</td>
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<tr>
<td>30. Modeled new sight syllables, but did not review syllables?</td>
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<tr>
<td>31. Mixed syllables to make sure learners were reading, not memorizing?</td>
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<tr>
<td>32. When heard an error, stopped and modeled again ONCE?</td>
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<table>
<thead>
<tr>
<th>Step 6/7: Sight Words (Naming words on sight)</th>
<th>4</th>
<th>3</th>
<th>2</th>
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<th>0</th>
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</thead>
<tbody>
<tr>
<td>33. Read the word as a whole quickly, did not separate into letter sounds?</td>
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<tr>
<td>34. Asked the learners to explain the meaning of the word?</td>
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<tr>
<td>35. When heard an error, stopped and modeled again ONCE?</td>
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<tr>
<td>36. “Play:” Mixed up words in the lesson, and after lesson introduced “sight-word game”?</td>
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<tr>
<th>Step 6/7: Teacher Read Aloud</th>
<th>4</th>
<th>3</th>
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<tr>
<td>37. First read the story with expression?</td>
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<td>38. Read story a 2nd time and asked comprehension and vocabulary questions?</td>
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<td>39. Was aware when learners were inattentive and got them back on track?</td>
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</table>
### Step 7/8: Independent Reading

<table>
<thead>
<tr>
<th>Question</th>
<th>4</th>
<th>3</th>
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<tbody>
<tr>
<td>40. Began by interpreting pictures in the story on a chart ONCE?</td>
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<tr>
<td>41. Went through story on chart ONCE, drawing finger under each word and NOT allowing learners to “read” more than one word at a time?</td>
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<tr>
<td>42. Monitored and assisted the learners to read by drawing finger under each word, not memorize by “reading” the whole sentence without pausing?</td>
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<td>43. Only talked 2 mins to introduce story, leaving 8 mins for learners to read?</td>
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<td>44. Reminded the learners to read for their families at home and to bring their books back to school?</td>
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<tr>
<td>Lesson Time (10 min) Begin : Finish : Total :</td>
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</table>

Other comments:

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

Final Score _______ / 176 (Isizulu) = _______ % implementation of SMRS
160 (Sepedi & Setswana)
Appendix B: Materials Development Overview, South Africa

1. Write simple stories (beginning, action, resolution) based on folklore and tradition that are developmental in nature. For example, the title of the first story is simply, “Sandra’s Book,” inserting the child’s name and a drawing of a book. The other 24 stories in Book 1 follow a sequenced program progression, depending on the most frequent one-syllable words in the language and words developed by blending letters into sounds. (If a two-syllable word is needed, it is either taught as a sight word or pictured in Book 1.)

2. As the stories are written, the Program Progression Guide is simultaneously developed detailing the letter sounds, decodable words, and sight words (highly frequent words) the teacher needs to teach directly, ending with a story using those words. Those words are repeated frequently in subsequent stories.

See Figure B1 for an example of a Program Progression Guide in English. It details what is included in each seven-step lesson: Step 1, reread a familiar text; Step 2, phonemic awareness; Step 3, phonics (letter names and sounds); Step 4, decoding (blending letter sounds into words); Step 5, sight words; Step 6, listen to a read-aloud; and Step 7, read independently.

Figure B1. Book 1 Program Progression Chart (English)

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<td>1</td>
<td>N</td>
<td>6 min</td>
<td>1 min</td>
<td>2 min</td>
<td>3 min</td>
<td>3 min</td>
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<td>10 min</td>
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<td>Story Title</td>
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<td></td>
<td>R</td>
<td>Story 1</td>
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<td>3</td>
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<td>Story Title</td>
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<td></td>
<td>R</td>
<td>Story 2</td>
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<td>Child’s name</td>
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<td>4</td>
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<td>5</td>
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<td>men</td>
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<td>Story 5</td>
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<td>TEST 1: (Lessons 1-10)</td>
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<tr>
<td>1. Letter sounds: m e s n o t a f (6 out of 8 needed to pass)</td>
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<td>2. Decoding: me see, men to no not Tom man mat Tam fan fat met (10/13)</td>
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<td>3. Sight words: [Child’s name] I see run can you go down up (7/9)</td>
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<td>4. Read and answer questions for Story 10, at least 10–15 wpm (20–30 for Test 2, 30–45 for Test 3), with good comprehension</td>
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3. Translate the SMRS Teachers’ Manual for teaching the 25 lessons.
4. Gather short stories (1–5 paragraphs) for teacher to read aloud to children, along with comprehension and vocabulary questions.

5. Create a *Teacher Performance Checklist* for teachers and supervisors for Books 1 and 2.

6. Develop three *Mastery Tests* for learners (one after every 10 lessons).

7. For Book 2, gather stories already written. Choose from books included in the DoE’s *Reading Toolkit* and others. Depending on how many children are in classes, about 15 very easy books (Level 1), 15 easy books (Level 2), 10 average books (Level 3), and 10 advanced books (Level 4) are required.

8. Other activities in the *Reading Toolkit* will be adapted for teachers to use freely during the literacy period (approximately 90 minutes) following the 30-minute lesson detailed in the *SMRS Teachers’ Manual*. 
Appendix C: Example of SMRS Teacher’s Manual for Step 4—Decoding Letter Sounds into Words (English)

**Step 4) Decodable Words**

Refer to the *SMRS Program Progression Guide* for the letters/sound and words for each lesson.

Write the new word first, then the review words underneath in one column on the board.

Don’t separate the letters in the word.

| T : « Today, class, we have a new word we can read by blending the sounds of the letters together to make a word.  
T : « This word is « me ».  
T : « The first sound is /mmmmm/ »  
T : « The second sound is « eeee ». [Draw your finger until you want to stop the sound.]  
T : « Slowly » [Draw fingers slowly under the letters] ‘mmmmmeeee »  
T : « Quickly» « me »  
T : The meaning of the word is « point to yourself and/or say your name ».  
T : « Your turn. The sound of the first letter is ?» [Point to /m/]  
S : « mmmmmm »  
T : The sound of the second letter is ? »  
S : « eeeeee. »  
T : Slowly [draw finger under letters]  
S : « mmmm ’ eeee »  
T : Fast  
S : « me »  
T : « The meaning ? »  
S : (point to themselves [accept any reasonable answers, such as the child’s name]) |

Now continue with the review words from previous lessons. No need to model. Just ask learners to sound each letter and then blend them into a word. Go slowly and quickly. Make sure all learners are focused on the letter you are pointing to.

**Correction »**
If you hear an error, stop. Repeat the correction routine [my turn, your turn].

For example, with the word « me », one or more learner pronounces it « ma » :

| T : « My turn. Sound ? ___mmmm___ » [draw your finger under the letter.]  
T : « Sound ? ___eeee___ »  
T : « Slowly. ‘mmmmmmm ’ eeeeee » [Keep drawing across the board until you stop holding the sound.]  
T : « Rapidly ___me’ »  
T : « The meaning is ? »  
T : (point to yourself and/or say your name) |
T : « Your turn! [Point to first letter in the word] Sound ? »
S : « ___mmmmmm___ »
T : « Sound! » (Point to the second letter in the word)
S : « ___eeeee____ »
T : « Slowly! »
S : « ___mmmm....eee____ »
T : « Rapidly! »
S : « ___me______ »
M : « Again! »
S : « ___me______ »
T : « The meaning is? »
S : (point to themselves and/or say their names)