

# DEPARTMENT OF BASIC EDUCATION

## REPORT OF THE MINISTERIAL COMMITTEE FOR LTSM REPORT

Final Report

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## 1. EXECUTIVE SUMMARY

The Ministerial Committee for Learner Teacher Support Material (LTSM) was constituted in February 2010, based on a recommendation from the Review Task Team of 2009 for the Department of Basic Education (DBE). The LTSM committee employed various methodologies in arriving at the recommendations presented in this report. The recommendations can be summarised as follows:

### *National Catalogue*

The Committee recommends a national LTSM catalogue, per grade and subject, be developed. This should comprise of no more than 8 comparable items. Methods of selection, selection process, selection committees, evaluation forms, time frames, price limits and the form of the national catalogue are discussed in the body of the report.

### *Centralised Ordering*

The Committee recommends a system of nationally centralised ordering of LTSM, drawing on school-based choice of LTSM. The key building blocks such as providing sufficient information for decision-making, decentralised delivery and tracking systems are sub-recommendations.

### *Establish an LTSM Institute*

The Committee recommends that the DBE establish a research and development unit focussed on LTSM, in keeping with international best-practice. The form of such an institute and its functions are outlined to provide substance to the recommendation and safeguard against the misunderstanding that this amounts to recommending a state publishing house.

### *Reconfigure the role of government and private companies in LTSM provision*

While the Committee does not recommend an alternative to the current structure, it seeks to provide a method for considering this fundamental issue. It should be noted that no one alternative model was compelling to the Committee and this issue will require significant further investigation as the options are numerous.

## 2. TERMS OF REFERENCE

The review of the implementation of the National Curriculum Statement (NCS) highlighted the crucial role LTSM play in supporting and strengthening curriculum implementation. Following the recommendations from the Review Task Team, a Ministerial Committee for LTSM was formally established on 3 February 2010 (published in National Gazette No 32924), with a brief to focus on the following:

- Develop guidelines for a national catalogue of LTSMs aligned to the Curriculum and Assessment Policy Documents.
- Recommend an optimal list size with price guidelines, allowing teacher choice, quality control and cost effectiveness.
- Advise on strategic issues related to LTSMs.

The term of the LTSM Committee extended from February to July 2010.

### 3. BACKGROUND AND SUMMARY OF METHODS

In considering the issues encapsulated in the LTSM Committee's terms of reference, the *Report of the Task Team for the Review of the Implementation of the National Curriculum Statement*, October 2009, was taken as a point of departure. The Report not only provides a compelling case for a renewed and intensified focus on LTSM, but also guidelines for supporting and improving LTSM provision for South African schools.

The methods employed in developing the LTSM Committee recommendations include:

- An extensive comparative study of international LTSM development and provision. This included developing and developed countries, with a bias to countries deemed to have well performing education systems by international evaluation exercises.
- Secondary research on LTSM in South Africa schools. Primarily case-studies seeking to understand the dynamics of LTSM provision across provinces and a representative variety of schooling contexts.
- Stakeholder consultations with the publishing industry, provincial and national education officials. Relevant submissions to the Parliamentary Portfolio Committee on Basic Education and Public Hearings on Education Access and Delivery Challenges were also considered.
- Quantitative analysis of price and quantity of LTSM in South Africa over 3 years.

In addition, the expertise and experience within the Committee was also used as a valuable resource.

### 4. GUIDING PRINCIPLES

In establishing a common point of departure, the Committee has attempted to make explicit the principles guiding its deliberations. Recommendations were evaluated against these principles to assess their appropriateness. They are as follows:

#### 4.1. ALL STUDENTS AND TEACHERS SHOULD RECEIVE ALL CORE MATERIAL

The Committee has assumed that any reconfiguration of the current system of LTSM provision should be measured by the probability of achieving the goal of high quality LSM per learner for each learning area on a national basis. It was noted that for certain areas, such as Foundation Phase literacy, core material implies a suite of material.

#### 4.2. LOCAL RELEVANCE

In examining international practice it became clear that to import a 'best practice' LTSM provisioning model would be inappropriate. Underlying factors influencing successful implementation vary greatly across countries. For example: the administrative capacity in

schools and rates of petty crime is a key factor for successful textbook rental schemes; direct purchases by schools (as practiced in many SA schools) works well in most OECD countries and parts of the USA where school management is generally well developed and budgets are generous, but not in many developing countries where school management is more uneven and achieving economies of scale is more important. Therefore a model built on prevailing local conditions seems more appropriate.

### 4.3. LTSM PROVISION AS AN EXCLUSIVELY EDUCATIONAL MATTER

The Committee has adopted the guiding principle that broader publishing issues are a matter for a national book policy, which falls outside of this Committee's scope. Therefore it will focus exclusively on LTSM provision with a view to improving the quality of education and not investigate externalities.

### 4.4. EDUCATIONAL QUALITY

Any recommendation for new models of LTSM provision (in terms of government and private responsibilities), screening procedures and procurement methods should ultimately result in ensuring improved educational quality.

### 4.5. FINANCIAL SUSTAINABILITY

In considering the financial aspect of LTSM provision the Committee has assumed that recommendations should not only be cost effective, as in securing the benefits of large scale production, but also be sustainable over time. In particular, this relates to book retention and the estimated LTSM lifecycle.

## 5. RECOMMENDATIONS

### 5.1. A TWO PHASED APPROACH

It is apparent that some of the areas covered by the committee's work will require further investigation and a longer process than the term of this committee. Therefore a two-phased approach will be required, comprising short-term recommendations for implementation in 2011 (such as the development of a national catalogue) and longer-term recommendations (such as private and government roles in LTSM provision).

Furthermore it seems clear that some areas, e.g. textbook retention, will require a sustained effort for a solution to emerge, given the varied circumstances across South African schools. The required data to make an informed recommendation on this is also not currently available.

### 5.2. NATIONAL CATALOGUE

#### NUMBER OF TITLES

The Committee recommends that the National Catalogue be restricted to no more than **8 titles** per category. This should provide teachers with a choice of comparable titles that offer sufficient

variety to be appropriate for the diversity of classrooms nationally, while benefiting from improved economies of scale.

*Example:*

For Foundation Phase literacy this would mean a list of no more than 8 workbooks, with the 8 accompanying teachers' guides. Material such as readers and phonics programmes fall into a different category, therefore are considered separately. Among the listed titles there should be some difference in terms of the social context they draw on (e.g. rural and urban settings), assumptions on school readiness and language proficiency.

This would be the maximum number of approved titles, while the minimum number will depend on the number of submitted titles that meet the required quality standards.

The Review Task Team of 2009 recommended the national catalogue comprise 10 titles, based on the calculation that it would achieve favourable economies of scale. The LTSM Committee recommends that this number be lowered, considering the decision-making process teachers need to work through, international comparative studies while still retaining a reasonable range.

It should be noted that the process of making an informed choice of learning material requires much work: from information gathering, sampling to review. Therefore the smaller the number the more likely teachers are to make well considered choices, conversely a large number could be debilitating. However this needs to be balanced with the need to offer sufficient variety, which could be achieved by encouraging selection committees to include material which speaks to the diverse South African contexts, as opposed to approving a list of 8 very similar titles that offers little real choice. For example this could encourage using different social settings such as rural or urban, assumptions on language proficiency, or learner preparedness and need for additional support.

#### METHODS OF SELECTION

Considering the variety of LTSM it seems impractical to have one method to address all needs or one evaluation rubric/check-list applied to all LTSM. From the onset conceptual clarity will be needed on what constitutes an adequately resourced classroom covering 'core' and 'supplementary' material, as done in the Foundations of Learning Campaign, which should provide the basis for how material is solicited, evaluated and provisioned.

*Example:*

Based on the Foundations of Learning Campaign's recommended LTSM, submission of the different types of material could be solicited separately. Therefore reading schemes can be evaluated against each other (and not as separate titles). These will constitute assets for a school, which will develop a collection over time and could be monitored on the asset registry per school. Whereas workbooks could be considered consumable and be revised more regularly.

This approach will differ substantially to GET literature, where the time taken to effectively teach a text is known to be longer. Therefore the revision of the catalogue will be less frequent and new titles could be phased in, as opposed to wholesale changes.

In short, different areas need to be thought through in terms of teachers needs, managing the resource and subject/grade specific requirements.

The committee recommends that the **selection committee** for each area firstly **determine** the **underlying rationale** for LTSM provision within that area before submissions are called for. This should be made available to all possible suppliers well in advance of anticipated submissions. The mode of provision, in terms of budgeting, revision cycles and LTSM lifecycles (which leads to production values), should be determined at this point to allow for reasonable budgeting forecasts.

#### SELECTION PROCESS

There are many potential problems with using committees and evaluation forms to screen acceptable LTSM: the profile of the evaluators, the body selecting the evaluators, and whether or not to protect the anonymity of the evaluators and results. But the major problems often lie in the evaluation forms.

Very often these forms are based on a fundamental arithmetic flaw, whereby characteristics as different as number of colours, coverage of the curriculum, or the adequacy of contents are given points, and these points add up as if they refer to the same category.

To improve the rigour of the process the Committee's opinion is that evaluations should focus exclusively on educational merit of LTSMs. Other factors, such as production specifications, durability and price could be set by the DBE and applied consistently for all LTSMs, thereby nullifying them as variables in the selection process.

To achieve a manageable list size and quality the Committee recommends a **two tiered screening process**. The first tier would be to filter the material meeting the basic requirements, such as adherence to the NCS, appropriate methodology and relevance to South African learners. In essence this is quality assurance.

Should there be more than 8 titles which meet requirements, they should be subjected to a competitive process of ranking, with the top 8 being included on the approved catalogue. This competitive process is more akin to the search for excellence.

Currently various **evaluation forms** are in use within the national system, the Committee considered a sample and found a significant variation. Some examples of the weaknesses noted are:

- Non-comparable items are rated and added together to achieve an average score as if they were the same category. For example, pedagogy and production specification, leading to a mathematical flaw.
- Multiple questions are posed within one question, constituting a questionnaire design flaw.
- A positive bias is introduced by requiring a “substantial report” for negative evaluations while no substantial evaluation is required for positive evaluations.

Subjective evaluation is requested where factual evidence could be used for a more objective evaluation. For example, “is the material cost effective” could be recast in numeric terms based on price bands that allow for all learner to receive material, or a question on whether the values are appropriate could be more usefully linked to the stated values of the DBE, as opposed to relying on the evaluators subjective opinion.

The instruments for evaluating material, such as a grading rubric, could be developed by the selection committee in conjunction with clarifying the underlying rationale (as discussed above). While this will vary across education phases and subjects it should be centrally co-ordinated to ensure coherence.

#### SELECTION COMMITTEES

The constitution of the selection committee is a crucial component of the success of the entire process. The LTSM Committee recommends that this comprise of:

- Subject matter experts
- Language experts
- Outstanding subject-area teachers
- Facilitator

The expertise should be phase-specific and members could be drawn from a mix of higher education institutes, non-governmental organisations and the Department of Basic Education. The inclusion of **language expertise** on the selection committee is crucial in a multi-lingual country, as second language learners often face a significant barrier due to inappropriate language usage. Some have argued that this is the main underlying cause of the seemingly racial dimension of educational achievement in South Africa.

Potential conflict of interest and the opportunity for undue external influence should be rigorously managed. As a minimum requirement, members should sign an affidavit and legal action should be taken against any attempt to undermine the process.

#### TIME FRAMES

Time frames for the revision of material and renewal of the national catalogue should be stipulated per LTSM item, per grade.

As a guideline, the LTSM Committee recommends the following:

For a new curriculum or product, at least 18 months be allowed from publicising the curriculum to submission deadline for LTSM providers.

For curriculum revisions, such as a change in weighting within the curriculum, at least 9 months be allowed from publicising the curriculum to submission deadline for LTSM providers.

The renewal of the national catalogue will vary depending on the nature of the material, however as a guideline consumable items such as workbooks could be renewed annually, standard textbooks every 3 years and items requiring more teacher preparation, such as literature, every 4 years.

It should be noted that catalogue renewal need not entail changing the entire catalogue, but should be seen as a process of continuous improvement of the material offered.

#### FORM OF THE NATIONAL CATALOGUE

School-based research shows that many teachers use the catalogue or publishers' displays/workshops as the primary source of information in selecting material.

Given the more streamlined nature of the catalogue, the LTSM Committee recommends that a non-bias review accompany each item on the catalogue. For example, this could point out what type of learners, classrooms a particular text is most suited to. Highlighting differences, as opposed to promoting a text.

The committee further recommends that LTSM Summits be organised by the DBE, as opposed to publishers workshops, where teachers can peruse the material selected for the national catalogue. This should not be a marketing event, but could fruitfully be linked capacity development on LTSM selection, policy and usage.

#### PRICE LIMITS IN RELATION TO QUANTITY

There seem three generic ways of managing the price of LTSMs, namely: a recommended price, price bands and price limits. Price limits or caps appear the most favourable, where LTSM under a specified price point will be considered, as they allow companies to be innovative in producing at a lower cost to themselves. In other words, the maximum price is stipulated, not the minimum. The other two options will not invigorate innovation in this area, but rather lock the DoBE into annually increasing budget allocations.

A crucial factor in determining a fair price is the quantity purchased. Therefore the committee is in favour of developing a matrix of price limits per quantity purchased. It is assumed that the price limits will be such that the 'one-child-one-book' principle will be achievable.

### 5.3. CENTRALISED ORDERING

To reap the full benefits of economies of scale and consistently apply rigorous quality assurance measures a centralised ordering system would be needed. This implies having **one LTSM procurement system for section 21 and 20** schools and across all provinces.

The following building blocks for centralised ordering are recommended:

- A **national catalogue** will be provided, listing all approved material, which will be the basis for selection.
- Schools will make the choice of material for their classrooms, appropriate support for this decision-making process should be provided. **School-based choice** could be achieved through collaborative effort - of subject teachers, Heads of Department, Subject Advisors and where feasible drawing on expertise from surrounding schools – forming school selection committees per subject. The material selected is crucial in effective LTSM utilisation and therefore requires significant consideration.
- Currently the available information is often inadequate for informed LTSM decision making. Therefore it is recommended that all listed texts on the national catalogue is accompanied by **sufficient information**. For example, expert commentary on the strengths and conditions material is appropriate for, or samples at exhibitions or workshops. Ideally these would not be publisher marketing events, but focus on educational merit. It should be noted that the Publishers Association of South Africa has recommended to the LTSM Committee that free electronic copies or extract of listed material be made available to schools for the selection process. This offer should be taken up and other digital options explored. It is worth bearing in mind that a system based on printed sample copies will limit the ability of new and small publishers to compete successfully, therefore undermining the conditions necessary for the best quality material to be produced.
- Orders will be centralised and placed with the relevant supplier. Where possible material should be sourced directly from producers to limit mark-ups along the distribution chain.
- Delivery of physical goods could be decentralised, to shorten time it takes to reach schools and lower distribution cost. For example, distribution hubs could be used throughout the country.
- All orders, delivery and payments should be monitored through a central database. As required by the PFMA, third-party verification will be needed, i.e. confirming quantity, time of delivery, condition of material. This could be done at the delivery nodes.
- Funds used for the purchase of material will be deducted from the Norms and Standards provision for LTSM. The remaining funds could be transferred to provinces.

To verify material actually reaches a school on time, a feedback loop could be developed. For example, a provincial officials or schools could directly alert the central purchasing body, an LTSM Institute, of the delivery failure. The school or cluster of schools could then be investigated to ensure the situation is remedied. Communication tools such as SMS could be explored for this feedback loop, in addition to reporting structure suggested under the LTSM Institute.

#### 5.4. ESTABLISH AN LTSM INSTITUTE

The Committee recommends that DBE establish a dedicated LTSM Institute, which will function as a hub to guide the development and provisioning of quality LTSM.

##### RATIONALE FOR ESTABLISHING A LTSM INSTITUTE

International comparative studies show that well performing education systems have a dedicated LTSM research and development unit. Given the importance of LTSM in curriculum implementation and the amount of funding allocated to it, established organisational design theory suggests that there needs to be one point within the DBE with specialised expertise and that is held accountable for LTSM.

##### *Example:*

Countries high up on the TIMSS and PIRLS rating list - countries that are recognized for the quality of the teaching and learning they offer - are all actively involved in textbook research and development, countries like Singapore, Canada, Korea, Hong Kong, Taiwan, Japan; etc.

Countries at the bottom of the TIMSS and PIRLS list, have a limited or mostly no involvement in textbook research and development, this would include countries like, South Africa, Morocco, Saudi Arabia, Qatar, Kuwait, etc.

(PIRLS = Progress in International Reading Literacy Study; TIMSS = Trends in International Mathematics and Science Study).

It is important to note that **this does not mean state publishing**, i.e. where the state takes over the role of textbook publisher. International studies show no positive correlation between state publishing as a variable and improved educational performance. Generally these institutes focus on research and management of LTSM, while some do produce limited LTSM based on research. In many instances they work with the publishing sector and distribution companies.

## INSTITUTIONAL TYPE

Ideally this should be a small, specialised and professionally staffed unit with the general mandate to manage and continually improve quality, cost and timing of LTSM provision nationally. Should the unit deliver even a small percentage saving on the current LTSM budget, it should cover its cost, resulting in a favourable cost-benefit equation.

Given the range of expertise required and the cyclic nature of activities it seems appropriate to adopt a 'hub' type of organisational design, as opposed to having all skills internally, drawing extensively on external expertise and experience in the provincial departments, higher education institutions, research institutes and non-governmental organisations.

## INSTITUTIONAL FUNCTIONS

Based on similar types of institutes and the challenges in the South African system, the functions should include:

### *Improving the efficiency and effectiveness of LTSM provision.*

This could include instituting a system of accountability at each level of the delivery system where the number of books delivered and the condition thereof is signed off at school, district and provincial level and data captured centrally. Administering a feedback system in the form of an annual LTSM report from each district and province so that problems can be dealt with. Provide consequences, e.g. de-listing, if publishers or deliverer agents do not meet obligations, changes to books etc.

In relation to book retention, the Institute could develop case studies regarding best practice for book retention in different circumstances. Implement some system of recognition of best practice in this regard. Communicate this to schools, districts and provinces

### *Forecasting demand and estimate cost*

Conduct and collate the results of the school LTSM inventory suggested above so that an objective assessment of the current situation can be made and year by year future needs projected. The inventory should be a grade by grade, subject by subject analysis of LTSM available in each school, and LTSM that is needed in the next year. It should also include details of where LTSM is stored and how it is managed. (See example, Appendix X)

### *Co-ordinate LTSM Related Issues*

The modes of co-ordination needed for effective LTSM management are numerous: ranging from links with teacher development programmes to ensure alignment to working with provincial officials. One recommended form of co-ordination is to work with provincial LTSM specialists in each province and each district who be responsible for forwarding the relevant information to the LTSM institute, do spot checks to verify information, and who will write a report identifying problems annually.

A crucial form of co-ordination would be working with the publishing sector, to ensure a healthy working relationship and the best conditions for the development of quality material.

*Managing cost and centralised ordering,*

As previously mentioned, a centralised ordering system is recommended; the Institute would be a logical place to locate these functions.

*Managing the screening processes and improve the methodology.*

Implement a streamlined system of book selection, for example: LTSM Institute selects book selection panel for particular phase and subject. The panel works with the Institute to list core materials required at each level and draw up rubrics. The LTSM Institute draws up the parameters regarding cost and specifications and a time line for submission. This information is given to publishers.

When the books are sent to the LTSM Institute for selection the LTSM Institute manages the book selection meetings and is responsible for printing the final list in the national catalogue. It remains responsible for updating the catalogue on a regular basis.

*Manage the development of material.*

Should the DBE find the private sector not able to adequately meet the LTSM needs in a particular area, the Institute could manage the development of the required LTSM. It would be crucial that any material developed here be subjected to **rigorous independent quality assessment** processes, so this does not become a source of sub-standard LTSM production that would not have been competitive in the open market.

Ideally any material developed should be linked to a simple monitoring and evaluation process to allow for continued improvement over time.

## 5.5. RECONFIGURE THE ROLE OF GOVERNMENT AND PRIVATE COMPANIES IN LTSM PROVISION

While many of the above mentioned suggests are related to improving the current system, the Committee also considered the more fundamental issue of how the system is currently configured, in terms of private and government responsibilities.

In considering alternatives, the Committee found it inappropriate to simply consider government vs. private provision. Rather, it has broken down the process into components to show various permutations. These are largely based on reviewing systems internationally and illustrated in the table below.

Textbook policy choices: Government/private sector distribution of responsibilities alternatives						
Options	1	2	3	4	5	6
Curriculum	G	G	G	G	G	G
Elaboration of texts and illustrations	G	G	G	G	P	P
Editing	G	G	G	P	P	P
Pre-press preparation	G	G	G	P	P	P
Printing and binding	G	P	P	G	P	P
Distribution, storage, sale	G	G	P	G	G	P

Legend: G: government undertaking; P: private sector undertaking

The objective is to examine these alternatives to determine 'who can do what best', given the DBE objectives and resources. This will require a detailed feasibility study and specific stakeholder engagement, which are not be achievable within the time-frame of this committee.

It should be noted that there does not appear to be one 'best model' that can be recommended, but rather it is a case of finding an approach which is best suited to a particular context and set of objectives. In fact, some successful education systems use different models for different phases of education and subjects. Therefore a mix of models should also be considered.

As previously mentioned, this is a fundamental issue and deserves a dedicated study should alternative paths be pursued.

## 6. CONCLUSION

In the DBE drive to strengthen and support curriculum implementation in South African schools, textbooks and other educational resources has become a crucial factor in ensuring improved educational performance. However, evidence suggests their current utilisation is far from optimal, therefore presenting obstacle to achieving the overall goal.

In general the LTSM Committee focused on recommendations that would ensure good quality material being made available to all schools as a starting point. Other issues such as good combinations of material in classrooms and supporting teacher development regarding LTSM will hopefully flow from this starting point. As case studies have shown, effective LTSM utilisation generally develops over time through sustained focus.

The Committee would like to stress that the recommendations should be taken as a combination and not isolated items. For example, introducing a national catalogue will raise the risk to quality education should it not be accompanied by improved screening processes. Similarly, the cost benefit of a stream-lined catalogue will be undermined without centralised ordering, or school-based choice of LTSM without sufficient information and expertise will be less likely to improve educational outcomes.

In terms of implementing any new policy or procedures in the LTSM area the Committee increasingly became aware of the importance of effective communication for successful change. In stakeholder consultations 'communication' consistently featured as a central concern. This seemingly self-evident variable could well undermine the best laid plans should it not receive the attention it deserves. Equally important in terms of implementation, is the system's ability to cope with large-scale changes. For example the publishing sector seems unlikely to cope with the demands of new submissions for all grades over a one or two year period, similarly it seems clear that provincial officials require time for orientation programmes and roll-out. In short, the Committee would urge that a well communicated and phased approach is adopted for implementing changes to the current LTSM system.