

## TERMS OF REFERENCE for EVALUATION SERVICES: Senior Phase English First Additional Language Backlogs Project

### 1. Introduction

This is a call for the services of an agency/ consortium of agencies / individuals with the know-how and capacity to **evaluate a Senior Phase (SP) English First Additional Language (EFAL) Backlogs Project**. The Project runs over two years, covering the period January 2022 – December 2023 and the evaluation is expected to be implemented over this period.

### 2. Background

Given that there is limited evidence on interventions to address language proficiency, this pilot project tests interventions targeting teachers and learners. Studies that exist examining the state of Grade 8 and 9 learner performance, draw the following conclusions:

1. English as a First Additional Language (EFAL) in the Foundation Phase does not adequately prepare learners for the transition from learning in their Home Language to English in Grade 4. The Annual National Assessments Studies (ANA 2014) show that only fewer than 18% of Grade 9 learners achieve above 50% in EFAL, namely their second language<sup>1</sup>.
2. This poor performance of Grade 8 and 9 learners is indicative of the crisis of how few learners enter high school with the requisite proficiency in English, both as a spoken and written language, as well as a medium of instruction post-Grade 4. The Senior Phase curriculum demands that learners are equipped with competent English language skills, capable of analyzing and evaluating specialized texts, formulate and express opinion, and apply information skills that enable the interpretation and transfer of information.
3. By Grade 9, learners in lower quintile schools are approximately three grades behind the requisite grade level expectations, lagging in learning and content knowledge relative to their high quintile school counterparts. This learning gap is projected to widen to four years by Grade 12<sup>2</sup>. This means that the content and foundational competencies of preceding grades are often not mastered.
4. The Department of Basic Education's (DBE) Progression Policy where learners cannot repeat a grade twice in a phase also leads to a dissonance between learners' conceptual competence and their grade level. This results in accumulated learning backlogs triggering a

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<sup>1</sup> Rule, P. & Land, S., 2017, 'Finding the plot in South African reading education', Reading & Writing 8(1), a121. <https://doi.org/10.4102/rw.v8i1.121>.

<sup>2</sup> Moses, E., van der Berg, S & Rich, K, 2017, A society divided – how unequal education quality limits social mobility in SA.

decline in enrolment in Mathematics and Science at Grade 10 level. Subsequently learners struggle to achieve quality passes or worse, complete the FET Phase (Gr 10-12) contributing to **high learner dropout rates**.

5. Teachers themselves have content knowledge gaps. Teachers in the Senior Phase are usually the most under qualified and frequently do not have specialized training in teaching English, neither as a Home Language nor as an additional language.

Moreover, evidence suggests that working at the Senior Phase is recommended if we want to give learners a better chance at succeeding before they get to FET Phase. Hence the Zenex Foundation wishes to incubate a range of models to address learning backlogs in English First Additional Language (EFAL) at Grade 8 and 9 levels.

### 3. Zenex Interest in Senior Phase Backlogs

The Zenex Foundation 2025 strategy identifies **learning backlogs** as a key strategic area. As mentioned above the Senior Phase is one of the worst performing and neglected parts of the schooling system, as such the Foundation is focusing its support at this school phase. The Foundation is aware that any intervention to deal with backlogs must be out of school time and largely focus on learners. Teachers must be equipped to teach certain concepts better and to support projects for struggling learners

The Foundation's strategic intent is to develop evidence that provides answers to key strategic questions:

1. How do we improve backlogs targeted at learners in out-of-school time? Role of ICT?
2. What type of in-classroom interventions work best to deal with backlogs?
3. What role do teacher assistants play in dealing with backlogs?
4. What are the key pedagogical and content strategies required to eliminate backlogs?

The ultimate objective is to build scalable interventions for system uptake.

### 4. Intervention Project Overview

The project consists of four small pilot projects which are designed to test particular approaches to reduce learning backlogs/gaps of Grade 8 and 9 learners. Two pilot projects target teachers, while two pilot projects target learners. The pilot projects are located in in four Provinces, namely Gauteng, KwaZulu-Natal, Eastern Cape and Western Cape. The project targets 50 schools, 10 in each Province with the exception of one of the teacher pilots being tested in 2 Provinces, namely Gauteng and WC, hence 20 schools (See Table 1).

#### 4.1 Overarching Goals of the Learner and Teacher Pilots

The overarching goals of the **Learner** pilots are the following:

- To explore what content should be covered to develop learners who have **grade-appropriate knowledge and skills in English**, which enable them to be critical readers and produce texts for different purposes.
- To explore the effectivity of **technology to support learners** work independently to help mediate backlogs.
- To identify the components that work best for interventions that utilize time in-class and/or interventions that offer support out-of-school time.

The overarching goals of the **Teacher** pilots are the following:

- To explore what **conceptual and pedagogical knowledge** in English improves teacher capacity to better support learners to write, read and interpret texts in EFAL.
- To explore what content improves teacher capacity to **diagnose learner content backlogs** and to **adopt differentiated classroom strategies** to address the backlogs.

## 4.2 Project Specific Objectives

The specific project objectives of the **Learner** pilots are the following:

- To explore what content should be covered to develop learners who have **grade-appropriate knowledge and skills in English**, which enable them to be critical readers and produce texts for different purposes.
- To explore the effectivity of **technology to support learners** work independently to help mediate backlogs.
- To identify the components that work best for interventions the utilize time in-class and/or interventions that offer support out-of-school time

The specific project objectives of the **Teacher** pilots are the following:

- To explore what **conceptual and pedagogical knowledge** in English improves teacher capacity to better support learners to write, read and interpret texts in English First Additional Language (EFAL).
- To explore what content improves teacher capacity to **diagnose learner content backlogs** and to **adopt differentiated classroom strategies** to address the backlogs.

### 4.3 Project Scope

The pilots will be implemented in a total of 50 schools covering urban, peri-urban and rural contexts. The following table outlines the districts selected within each of the four Provinces, number of implementing schools, the project goals of each of the four models being tested as well as the project model modalities.

**Table 1: Overview of the Project**

<ul style="list-style-type: none"> <li>• National Pilot Project             <ul style="list-style-type: none"> <li>○ 4 provinces</li> <li>○ 50 schools</li> <li>○ 2 Learner pilots and 2 Teacher pilots</li> </ul> </li> <li>• Two-year Intervention 2022-2023</li> <li>• Implementation will run concurrently with evaluation</li> </ul>				
<b>Teacher Pilots</b>				
<b>Province</b>	<b>Implementing Partner</b>	<b>Districts &amp; Number of Schools</b>	<b>Project Goals of Specific Model</b>	<b>Project Focus</b>
<b>Eastern Cape</b>	Implementing Partner #1	Chris Hani East (5 schools) and East London (5 schools)	To capacitate Grade 8 and 9 EFAL teachers with pedagogical content knowledge towards: <ul style="list-style-type: none"> <li>• improving teacher capacity in supporting learners to write, read and interpret texts in EFAL.</li> <li>• developing intervention resources and materials to support EFAL teaching and learning.</li> </ul>	<ol style="list-style-type: none"> <li>1. Development of a teacher guide on Reading comprehension and Essay writing.</li> <li>2. Teacher training through workshops once a term.</li> <li>3. Professional learning communities' sessions once a term.</li> <li>4. Coaching sessions with teachers using WhatsApp and email.</li> </ol>

<b>Gauteng</b>	Implementing Partner #2	Ekurhuleni North (5 schools) and Sedibeng East (5 schools)	Equip English, mathematics and science Grade 8 & 9 teachers to address systemic language inequalities in multilingual/EFAL classrooms so that learners have the opportunity to:	Teacher professional development programme:
<b>Western Cape</b>		Cape Winelands (5 schools) Metro East (5 schools)	<ul style="list-style-type: none"> <li>develop the necessary literacy skills for learning and functioning in society, including in English and their home languages.</li> <li>Systematically engage their full linguistic repertoires, including their home languages alongside English, in order to access and engage with the curriculum content knowledge for effective learning.</li> </ul>	<ol style="list-style-type: none"> <li>Foundational 6-session training programme: 1.5 hours per session x 6.</li> <li>Practice-based workshops once per month: 6 in 2022 and 9 in 2023.</li> <li>Classroom-based support: 4 support days per month per school.</li> <li>Classroom library for each Grade 8 class to support development of independent reading, literacy and general knowledge.</li> </ol>
<b>Learner Pilots</b>				
<b>Gauteng</b>	Implementing Partner #3	Ekurhuleni North (5 schools) and Sedibeng East (5 schools)	Enhance learner proficiency in English, specifically the <b>importance of reading for understanding</b> and to improve their performance in other subjects. This will involve: <ul style="list-style-type: none"> <li>Supporting Grade 8 learners to improve their language, communication, reading comprehension and research skills based on a variety of text types, broadening their vocabulary and oral reading fluency.</li> <li>Build learners' <b>confidence</b> in speaking through the use of digital platforms to participate in debates and discussions.</li> </ul>	<ol style="list-style-type: none"> <li>An after-school accelerated language and literacy programme, called FUNDANAWE, for learners to attend twice per week for at least 2 hours a session. Online resources will be accessed using tablets (max of 80 learners per school; 10 schools, 2 Language Assistants per school).</li> <li>Two Knowledge Forum sessions per year targeting the School Management Team.</li> <li>Three Knowledge Forum sessions per year targeting the language teachers, who will also be closely involved and</li> </ol>

			<ul style="list-style-type: none"> <li>• To improve the quality and quantity of <b>writing</b>.</li> <li>• Assist <b>language teachers</b> in gaining new and additional pedagogical knowledge.</li> </ul>	<p>integrated into the after-school programme.</p> <p>4. A Project Coordinator who will support the Assistants in the language centres. The Coordinator will liaise with the provincial and district officials as well as the principals and language teachers.</p>
<b>KwaZulu-Natal</b>	Implementing Partner #4	Umlazi District (10 schools)	<p>To pilot a model of a learner support programme to improve reading with meaning in the Senior Phase using the support of Learning Support Agents (LSAs). This will be done by:</p> <ul style="list-style-type: none"> <li>• Establishing a corps of competent LSAs.</li> <li>• Identifying and supporting learners with poor reading ability.</li> <li>• Implementing strategies to improve reading with understanding.</li> <li>• Supporting EFAL teacher development.</li> </ul>	<ol style="list-style-type: none"> <li>1. Trained LSAs to support groups of identified poor readers.</li> <li>2. Carefully designed materials and strategies to support daily reading improvement.</li> <li>3. Coordinated reading activities, in class and extramural, using a blended learning approach.</li> <li>4. Reading clubs, access to online resources, competitions - reading for meaning and pleasure.</li> </ol>

## 5. Evaluation Scope of the Work

This ToR is a call for evaluation proposals to do a qualitative study which will help identify and understand what works and what does not work, and under which conditions, in these pilots that address backlogs in Grade 8 and 9. The main research questions the evaluation will be answering, using a mixed-method approach are:

### 6.1 Evaluation Questions

#### 6.1.1 Learner Pilots

- 1) Describe the nature of the language backlogs learners experience in the SP?
- 2) What is similar or different about the nature of learning backlogs in different provinces?
- 3) What can we learn about the nature of language backlogs and the way that they have been addressed in other countries with similar context to South Africa?
- 4) What strategies and approaches worked to build learners' content knowledge that helped alleviate the accumulated backlogs for fluent language acquisition? Are there minimum conditions for success?
- 5) How and to what extent did the respective learner model strategies in-classroom vs after-school interventions work for learners experiencing backlogs?
- 6) To what extent were the technology solutions to assist learners with backlogs effective?
- 7) How effective were the teacher assistants/learner support agents in addressing backlogs? Given the role they played, was there any specific activity they engaged in that promoted learning success and language proficiency?

#### 6.1.2 Teacher Pilots

- 8) To what extent did each of the teacher pilot models support teachers to address learning backlogs?
- 9) To what extent did the respective teacher model strategies support struggling learners who experienced learning backlogs?
- 10) What pedagogical strategies employed by teachers in dealing with language backlogs worked best?
- 11) In relation to Implementing partner #2, does leveraging a learners' home language (L1) to acquire and learn a second or additional language (L2) promote or hinder learning?
- 12) What were some of the teachers, learners and Learners Support Agent characteristics that promoted or hindered meeting the project goals?

#### 6.1.3 Questions Relating to All 4 Pilots

- 13) What is the extent to which the models of interventions are implemented with fidelity?

- 14) What specific contextual conditions most influenced or hindered the success of the pilot projects?
- 15) Which support modality was most effective in improving learning success amongst learners and teachers respectively?
- 16) Were the support materials developed as part of the pilot projects effective?

### Evaluation Conditions

It is important to note that the evaluation must consider the following:

- The evaluation must be in school (within curriculum time) for the teacher pilots.
- The evaluation will involve after-school (extra-curricular) activities for learner pilots.
- The evaluation must follow a cohort of learners from Grade 8 to Grade 9 and implemented over two years from 2022 – 2023.
- The evaluation must be able to evaluate the technology elements / tool where applicable.

## 6. Deliverables, Timelines and Processes

The following deliverables are expected:

- The development of data collection materials and instruments for capturing information to answer the evaluation questions set out above in Section 6.1.
- The development of a methodology for collecting information which may include on-site observations and interviews with learners and/or onsite observation and interviews with HODs and other project stakeholders.
- A final project narrative evaluation report and four case study reports must be produced, including executive summaries for each of the reports. The evaluators will be expected to present the findings of the report with project partners and stakeholders in an accessible format that may include infographics. The reports should include a review of relevant literature and project documents to substantiate and interpret the findings.

### 6.1 Evaluation Timelines and Outputs

The following table outlines some of the processes to be undertaken:

Services required	Deliverables	Timeline
Inception/Clarification Workshop	Developed Theory of Change and evaluation plan, including baseline data to be collected.	April 2022
Detailed evaluation implementation Plan	Questions, methodology and approved fieldwork plan, data collection and case study scope and outline.	June 2022
Literature review/ document review	A literature review including provincial and a review of some comparative countries.	

4 Case Studies: Initial Report (2 learner and 2 teacher)	What is the current situation in schools, what are the challenges, how are learners performing? What are teachers doing to deal with learners who are not grade ready?	December 2022
Evaluation Plan for 2023	Identify any changes that should be applied based on the context and the project implementation.	February 2023
Preliminary case study report	Draft report which includes fidelity report of interventions.	October/November 2023
Final case study report of the four pilot interventions	Four Final case study reports which address the questions set out in point 6. Case Studies should include executive summaries.	January 2024

## 7. Task Interpretation

- Kindly submit NOT more than a five-page proposal outlining how you understand the task and how you will undertake the task.
- Affirmative action principles will be used to assess applications.
- Only shortlisted organisations will be notified. Organisations can submit joint submissions or share the call with others.

## 8. Proposal Submission Process

Activity	Date
<p>Deadline for Submission of proposals</p> <p>The proposal submission must contain:</p> <ul style="list-style-type: none"> <li>• A brief outline of how you understand the task.</li> <li>• An outline of the evaluation design and evaluation logic. This includes outlining a process, methodology, data collection strategy, instruments and data analysis.</li> <li>• Specifying ethical requirements.</li> <li>• A detailed evaluation plan.</li> <li>• Timeline with key deliverables.</li> <li>• A detailed budget to support activities, please clearly identify VAT and profit where applicable.</li> <li>• Experience and expertise of the organisation and team that will undertake the evaluation. Outline of sector experience and expertise in evaluation</li> </ul>	7 March 2022

<p>services required and, where applicable, experience working at the Senior Phase level.</p> <ul style="list-style-type: none"> <li>• Company registration documents and 3 reference letters from previous clients confirming expertise and experience in listed evaluation support activities.</li> <li>• List of team members. This includes CVs of the team leader and researchers/evaluators, including their race and gender.</li> <li>• BEEE status.</li> </ul> <p>Details of the Board/ Trustees of the organisation, including their race and gender.</p>	
Shortlisting of candidates	11 March 2022
Shortlisted candidate interviews/ presentation to the evaluation team (if required)	14 March 2022
Preliminary decision of service provider	21 March 2022
Proposal for submission to the Zenex Foundation Board	25 March 2022
Contracting	April 2022
Clarification/Inception Workshop	April 2022

## 9. Criteria Weighting on Submission of the Proposal

Functionality	Weight
<p><b>1. Experience in national/provincial data collection:</b></p> <ul style="list-style-type: none"> <li>• A minimum of 3 years' experience.</li> <li>• Provided 3 recent reference letters and details of the fieldwork undertaken for each of them.</li> <li>• Specific experience in the secondary-school sector and especially in assessing curriculum and learning loss.</li> </ul>	25
<p><b>2. Methodology:</b></p> <ul style="list-style-type: none"> <li>• The proposal demonstrates an understanding of the project and plans to successfully complete the project within the prescribed timeframe.</li> <li>• Included <b>all required documents for bid application.</b></li> </ul>	30
<p><b>3. Capacity:</b></p> <ul style="list-style-type: none"> <li>• List of team members and contractors/experts to be used in specific activities. This includes CVs of the team leader and key researchers/evaluators, including number of Black African researchers on the team.</li> <li>• Names, experience and CVs of project supervisors or team leads and administrative team to work on the project.</li> </ul>	25
<p><b>4. Financial capability:</b></p> <ul style="list-style-type: none"> <li>• Detailed budget inclusive of VAT.</li> <li>• Audited financial statements for the last two financial years.</li> </ul>	20
<b>TOTAL</b>	<b>100</b>

## 10. Contracting

The successful bidder will be informed by 2 March 2022.

The implementation plan, deliverables as well as the nature and timing of reports and other required data/information will be finalized and form part of the contract. The contract will be subject to deliverables and report submission to the Zenex Foundation. The contract may be discontinued at any time based on substandard performance or non-delivery. The Service Provider commits to abiding by all Zenex Foundation policies and regulations. The Zenex Foundation will make payments within 30 days of receipt of the invoices based on approved deliverables. The total budget for the evaluation should not exceed R1,5 million.

## 11. Project Management and Governance

The Zenex Foundation will be the contractual body for the evaluation service provider. A Steering Committee will be convened by the Zenex Foundation that will comprise the implementing partners and representatives of the District or Circuit in which the schools are located.

This Steering Committee will advise on all key aspects of the evaluation activities. The Zenex Foundation will be the final arbiter in decision-making should consensus not be achieved.

## 12. Intellectual Property

The appointed service provider will assign to the Zenex Foundation its copyright to all data, instruments, documents, and reports emanating out of this study.

Permission may be sought by the service provider to use any data from the research. Such permission will not be unreasonably withheld provided the data will make a positive contribution to the sector and all reports and presentations emanating from such, will acknowledge the Foundation's role.

The results of the findings will be shared with the broader sector and other participating stakeholders such as schools, other funding agencies, and key identified role players in education including the Department of Basic Education.

## 13. Contact Person for Queries and Submission

Queries and proposals must be emailed to: Ms Nompumelelo Nkabinde  
[mpumi@zenexfoundation.org.za](mailto:mpumi@zenexfoundation.org.za)

**CLOSING DATE: 7 March 2022**

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The Zenex Foundation is an independent education grant-maker established in 1995 to improve teaching and learning outcomes in language and mathematics in South Africa. This strategic focus is driven by evidence of a proven relationship between language proficiency and success in mathematics, as critical for overall learner achievement. The Foundation's entire budget is committed to the fields of language and mathematics in Basic Education. To date, we have



disbursed over R1 billion in the South African education sector, the impact of which continues to be evaluated through extensive research and evaluation to ensure that every investment and project drives the advancement of education.