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Report:
M&E Guidance for Shine Literacy

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Monitoring and Evaluation Guidance for Shine Literacy

Executive Summary

The purpose of non-profit monitoring and evaluation (M&E) is to show non-profits what aspects of their programme are working and why, and thus help non-profits become more impactful. M&E also helps funders direct their money towards impact. M&E is expensive however, typically involving external consultants gathering data through assessments or surveys, and then analysing the data and writing an evaluation. Before undertaking M&E it is therefore important to review what we can deduce about the programme through existing data, literature and evaluations.

This report explored the impact of Shine Literacy's Youth for Literacy (Y4L) programme. Y4L was part of Shine's 'Creating a Culture of Reading at School' and ran from 2021 to 2022 (though the programme has continued under a slightly different format in 2023). In Y4L, unemployed matriculants were provided with training and paid a minimum wage to spend the full day with Grade 2 and 3 classes as reading partners in 17 schools in the Western Cape (3880 learners). Age appropriate books were donated to the schools and all children in the classes interacted with the reading partners, either doing Paired Reading (one on one) or Shared Reading (reading with the whole class). In this report we place Y4L within the broader context of the Shine organisation; ascertain whether Y4L's impact can be quantified at this stage; assess what other information is available that supports Y4L's impact; and lastly provide recommendations on Shine's overall M&E approach.

We reviewed Shine's Theory of Change and consulted with the Shine staff to understand their various programmes. We found Y4L shared many similarities with other Shine programmes, particularly Shine Literacy Hour (SLH) and Khanyisa. SLH was robustly evaluated and showed a positive impact on learner literacy. Whilst Y4L was very similar to SLH (both had Paired and Shared Reading and included donated books) the reading partners in SLH were typically well educated, highly motivated volunteers who had children of their own (markedly different to the unemployed youth in Y4L). Khanyisa was more similar to Y4L but lacked robust evaluations, though the qualitative evidence gathered suggested Khanyisa (and thus Y4L) would have a positive impact on learner literacy.

Whilst Y4L had both quantitative data (Early Grade Reading Assessments administered by teachers) and qualitative data (surveys with Reading Partners) the data were unsuitable for impact analysis. This was in part because the Y4L was not uniformly implemented with some Reading Partners dropping out during the programme. In addition, the EGRA data were of mixed quality: they were administered by teachers rather than trained external assessors; many learners were missing two assessments to use as a baseline and endline; those that had two assessments did not have a proper baseline

as their first test was from term 2 whilst Y4L started at the beginning of the year; the EGRA scores gave an overall test score rather than per competency; and most critically we lacked data on a comparison group (similar learners who did not receive the Y4L programme) and our attempts to find a quasi-control group failed. The qualitative survey data suggested the programme benefitted learners and highlighted how the programme could be improved, however they could not be used to provide impact magnitude.

We turned next to what existing research could tell us. There was strong global research underpinning the design of the Y4L programme including their knowledge of the classrooms in South Africa; the importance of reading for pleasure; access to books; the dual emphasis on decoding and comprehending; shared and paired reading; Shine's approach to teaching and learning; modelling and interacting with learners; and sufficient programme exposure. Evaluations from other similar non-profit programmes such as Wordworks' Ready Steady Read Write and Help2Read showed evidence of effectiveness. This was particularly useful in the case of Help2Read, where unemployed youth were hired as reading supports (similar to Y4L).

Seen together, the data and evaluations conducted by Shine and those by other researchers suggest Y4L could have a positive impact on learner literacy but further research is needed. Going forward, we recommend Shine update their M&E tools, in particular their Theory of Change and develop an Indicator Matrix; and reach out to Wordworks and Help2Read to learn more about their evaluations. Next, we suggest Click does an implementation evaluation to see whether the new iteration of Y4L is being implemented as designed and if the environment is interacting in the way that was expected. Whilst existing evidence has answered some of these questions there were a few gaps in our knowledge that remained. These can be answered through classroom observation, focus groups and surveys.

After this we encourage Shine to consider its role in the South African education sector, thinking through what scale it envisages and whether it wishes to contribute to existing research on programme efficacy. This will help Shine choose between various evaluation approaches that could include a randomised control trial, quasi-experimental approach or a quantitative descriptive evaluation.

Contents

1. Introduction

Most non-profits begin with a desire to positively impact the world. Naturally, the non-profits and their funders are curious to quantify this impact and understand the reasons why (or why not) an impact can be observed. This process is called monitoring and evaluation (M&E). M&E findings can equip non-profits to adjust their programme to amplify impact, and equip funders to make responsible decisions in allocating funding. M&E is, however, expensive. It takes time and money to collect and analyse data. M&E should be undertaken with a clear understanding of:

- The non-profits' aims and their plan to achieve these, typically captured in a Theory of Change (TOC);
- The data they collect and how this maps to the TOC (often captured in Indicator Matrix);
- Any external events that may have impacted the non-profit;
- Research or evaluations the non-profit has already done;
- Research or evaluations other similar non-profits or programmes have done (provided these are available);

We review these five aspects in this report for the literary-support organisation, Shine Literacy. Our aim is to:

1. Summarise Shine's programmes and their approach to M&E;
2. Place Shine's Youth for Literacy (Y4L) within the broader context of the Shine organisation;
3. Ascertain whether Y4L's impact can be quantified at this stage;
4. Assess what other information is available that supports Y4L's impact; and
5. Provide recommendations on Shine's overall M&E approach.

The intended audience of this report is Shine and the funder of their Y4L programme, the Allan and Gill Gray Foundation under their Philanthropies banner.[1]

We begin in Section 2 by giving an overview of Shine, their TOC, their various programmes, and how Shine has adapted as a result of COVID-19 and the associated school closures. Together, Sections 3, 4, and 5 investigate to what extent the Y4L programme could be estimated to be having an impact on literacy outcomes for children. In Section 3, Shine evaluations and the data they have collected are analysed to determine (1) whether data collected for Y4L could be

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[1] In addition to the Y4L programme, Allan Gray also funds part of the SLH Chapter model, which will be discussed below.

used with validity, and (2) whether previous evaluations of Shine programmes could shed light on current practice efficacy.

Section 4 broadens this investigation by looking at other programmes in South Africa and Section 5 reviews global research on literacy practices similar to Shine's. Section 6 reviews the information presented in sections 2-5 to understand the likely efficacy of the Y4L programme. Section 7 summarises and provides recommendations.

2. Shine Overview

2.1 Who is Shine Literacy?

Shine Literacy is a non-profit organization that aims to enhance literacy skills among young children from underprivileged communities in South Africa. Established in 2001, the organization collaborates with teachers, volunteers, and parents to offer evidence-based programmes that provide consistent and efficient assistance to children as they learn to read and write. Shine works in schools directly through their Head Office and Shine Centres (six up until 2021), but since 2009 Shine has also partnered with external 'Chapters' who are not directly funded by Shine but are supported by Shine with both training and materials. Both the Shine Centres and Chapters are based in schools, but while the Shine Chapters take on the Shine programme internally[2], Shine administers and funds Shine activities in Shine Centres. Both Chapters and Centres take part in Communities of Practice hosted quarterly by Shine.

While Shine works exclusively in the Western Cape in English as a First Additional Language (EFAL), Shine Chapters work in a range of provinces and languages. In the Shine Chapters, one school will often serve children with multiple different home languages. Of the 36 Chapters running in 2021, 25 were run in the Western Cape with children speaking a mix of English (17), Afrikaans (16), isiXhosa (16), Shona (2), Sotho (2), and French (2); five were run in the Eastern Cape with isiXhosa speakers; three were run in Gauteng with speakers of Tsonga (1), Afrikaans (1), Sotho (1) Zulu (1) and Sesotho (1); and three were run in KwaZulu Natal with speakers of English (2), French (1), Zulu (3), Shona (1), and Tsonga (1).

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[2] That is, the Chapter is funded and administered independently of Shine, despite implementing the Shine Literacy Hour programme. Chapters also independently run community-based programmes. They are however supported by Shine with materials and training.

Over the years, Shine has offered four programmes which all share core practices. Shine Literacy Hour (SLH) ran from 2001 to 2021 and could be considered to be the 'flagship' programme up until this point. Khanyisa ran for two years in 2017 and 2018. Due to issues associated with the COVID-19 pandemic (school closures, limited visitors allowed to schools and a shortage of people willing to volunteer), Shine shut-down SLH[3] and developed two programmes, Creating a Culture of Reading at School and Creating a Culture of Reading at Home. These latter two programmes started in 2021 and are currently running in February 2023. The new models retain essential elements of the SLH programme but aim to reach more children given the increased need after the COVID-19 school closures. The delivery model has however faced setbacks, particularly in securing funding for Reading Partners (to be elaborated on below) and the data quality for evaluation.

The Shine Centres were also shut down in 2021 and currently the Head Office runs all programmes directly implemented by Shine. Shine Chapters are however continuing with SLH. As of February 2023 all 22 Chapters are still implementing SLH and continue to receive training and material support from Shine. Thus whilst Shine is not directly running SLH, the programme continues to be implemented indirectly. There are eight organisations that run chapters (many of them run multiple chapters and plan to scale in the future).[4]

In 2023, there are 22 Chapters reaching 5100 learners. The Shine Head Office works in 16 schools but the number of learners reached is currently unclear due to the reliance on Teacher Assistants (to be expanded upon below) who have not yet been placed in all schools. Pre-pandemic, Shine reached 34 schools and 5514 learners.

Shine is also involved in facilitating Communities of Practice (CoPs) where they provide peer learning, continuous support, and encouragement to teachers[5], while providing a space where they hold each other accountable. The CoPs often focus on sharing best practices and creating new knowledge to advance the teaching professional practice. In 2022, two such CoPs took place. They are

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[3] This refers to SLH in Centres. SLH continues to be run in Chapters.

[4] For example, the organisation LifeMatters has 6 Chapters running, while the organisation Masinyusane has 5. Not all partner organisations run multiple Chapters however.

[5] Shine also conducts CoPs for Reading Partners which includes the same as well as formal training. These take place monthly or bi-monthly. Chapters also tend to organise their own CoPs with Chapter staff, run by Shine. These are held quarterly. Herein the Chapters discuss challenges they are facing and thereafter transfer their knowledge to teachers.

generally organised geographically but can sometimes be held for a specific school.

Shine's Theory of Change (TOC) is given below which covers all Shine programmes, both pre-pandemic and post.

Figure 1: Shine TOC
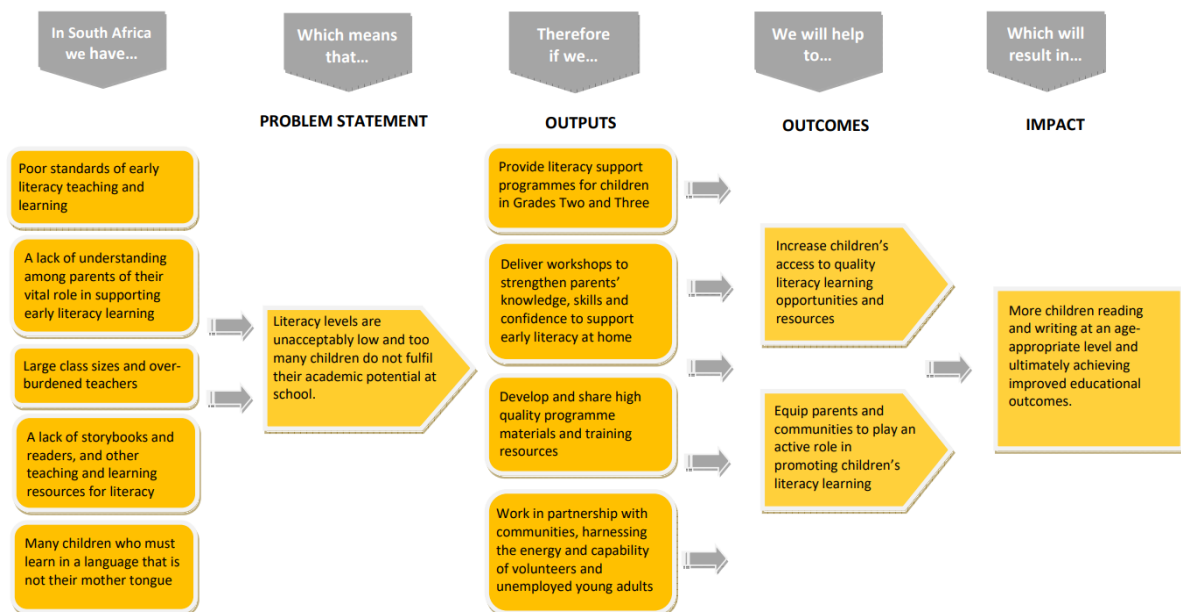
Source: Shine Literacy, 2023

The TOC differs from standard TOCs by including the context and problem statement as the first columns. It also does not define Activities in their own column, but closer inspection reveals that the Outputs are actually Activities. A workshop to update the TOC would be helpful and is discussed further in the Recommendations section. However, the TOC does serve as a useful roadmap for Shine, highlighting what Shine wants to achieve and how. Equally, by omission, the TOC highlights what falls beyond Shine's ambit.

Shine describes the South African context as follows:
1. Poor standards of early literacy teaching and learning,
2. A lack of understanding among parents of their role in supporting literacy,
3. Large class sizes and overburdened teachers,
4. A lack of storybooks and other literacy resources, and
5. Many children learning in languages other than their mother tongue.

This leads to the problem statement, which is that, in South Africa, literacy rates are disappointingly low, leading to many children falling short of their academic potential.

The activities Shine implements are
1. Provide literacy support programmes for Grades 2 and 3,
2. Provide parent workshops,
3. Provide high quality materials and training resources,
4. Partner with communities by utilising volunteers and/or unemployed youth.

These would presumably be associated with outputs such as number of programmes, number of workshops, number of materials/resources, and number of volunteers/unemployed youth.

By doing these things Shine hopes to achieve the outcomes of increasing children's access to quality literacy learning opportunities and resources, and equipping parents and communities to actively promote early literacy. The second outcome is actually also an activity and thus would need some redefinition. The ultimate impact is more children reading and writing at an appropriate level and ultimately of improved educational outcomes.

In addition to the TOC, Shine programmes are driven by The Shine Ethos, which is a statement of five principles which underpin all Shine Literacy programmes. It stresses the individuality of each child and promotes warmth, support and respect in the relationships between volunteers and children. It also emphasizes the significance of creating a learning environment where children are not under pressure and have the flexibility to learn at their own pace and level. The five principles which make up the ethos are:
1. Each individual matters,
2. Listen with respect and without interruption,
3. Treat each other as thinking peers,
4. Ease creates, urgency destroys, and
5. Practice the art of appreciation.

2.2 Shine Literacy Programmes

2.2.1 Shine Literacy Hour

As the name suggests, during the SLH volunteers spend 60 minutes one-on-one or two-on-one[6] with children. SLH consists of seven core components: (1) Recruiting and training volunteers, (2) Taking children out of the classroom, (3) Shared Reading, (4) Paired Reading, (5) Writing, (6) Phoneme Awareness through Games, and (7) Books.

1. **Recruiting and training volunteers:** SLH relies on volunteers from the community who sign up to give their time supporting literacy in schools. Those who choose to become volunteers are generally well-educated with many years of work experience. They are often people who have children of their own. They have been described by Shine as "very trainable, quick to understand concepts, and very motivated to learn and tutor". These volunteers are trained by Shine or the Shine Chapter they were recruited through, with Shine support. SLH volunteers not only receive the 3-hour initial training but are also encouraged to attend ongoing 'In Depth' training sessions on specific areas of knowledge or skill.[7] They are overseen by Centre or Chapter Managers who provide support and coaching as needed. Volunteers are not paid, however, some Shine Chapters employ paid interns to run SLH rather than or in addition to volunteers. The only requirements to serve as a volunteer or intern is to be 18 years of age, to sign a volunteer agreement, and to submit one's ID to be checked against the child offenders list.

2. **Taking children out of the classroom:** SLH involves assessing the reading capability of children as they begin Grade 2 and selecting the weakest learners for literacy support. These learners are then pulled out of class for an hour twice weekly and brought into the Shine classroom (a space within the school dedicated to Shine Literacy). Learners are assessed with the Wordworks Early Learning Assessment (WELA) and selected for SLH if they score as 'At risk', 'Below level', or 'Near level', but not if they score as 'On Level'. The children are assessed again after 6-months or 32 hours of implementation to re-evaluate need for inclusion in the programme. If children remain below level they can continue with SLH throughout the

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[6] Two children to one adult.

[7] This has changed since 2019. Now, training is offered as an issue arises and Shine also provides additional online and video training. In addition, Shine employees who do site visits (i.e. the Social Franchise Manager) will provide on the spot training after observation.

remainder of Grade 2. A reselection assessment is also conducted at the end of Grade 3 to determine eligibility to continue with SLH in Grade 3.

In the hour which the volunteer spends with the child, the child will engage in all of the following:

3. **Shared Reading:** the volunteer reads a story aloud to the child. This is intended to stimulate interest in and a love for stories and reading.
4. **Paired Reading:** the volunteer generally reads a book or text aloud with the child and when the child feels capable of reading alone, they give an agreed upon signal, and the adult steps back. This is intended to allow the child to practice reading in a safe non-judgemental environment.
5. **Have-a-go-writing:** the volunteer encourages the child to generate ideas and then expand the language they use to express themselves, using a "Talk, prepare, write" approach. The volunteer emphasises practicing the art of writing, focusing on the overall meaning of the writing, rather than writing with correct grammar or spelling. Volunteers praise wherever the letter-sounds have been correctly represented and focus on enjoyment. This activity is designed to build confidence by allowing children to make an attempt without an expectation of getting it right immediately.
6. **Games:** volunteers use games that address the technical skills children need to learn to read and write effectively (such as decoding, phonological awareness, alphabetic knowledge, and high-frequency word skills). Children advance through the graded games over the year. Volunteers are trained to use the children's writing to ascertain which games should be played or revisited.

Finally, Shine provides reading material to all participating schools.

7. **Books:** Shine Literacy's Centers (when running) and Chapters are stocked with a range of storybooks and a set of leveled readers. They also offer "Take-home books" that children can borrow between sessions. Shine ensures that at least 20 different readers are available per level. This gives the child choice but also allows them plenty of opportunity to build up fluency, accuracy, and confidence at each level.

Together these seven components drive the SLH. In terms of reach, in 2019 (the last year in which SLH ran uninterrupted by COVID-19), 1920 learners at 34 schools were reached.

While SLH ran consistently between 2001 and 2019[8], school closures and difficulties entering schools affected implementation of SLH in 2020 and 2021, after which time SLH was halted in Shine's Centres and two Chapters. Overall 7 schools were affected.[9] This includes the 6 schools associated with Shine Centres and two Chapter schools (8 schools). However, one Centre became a Chapter instead and continued running SLH, leaving 7 schools in which SLH was halted. Shine discontinued SLH both due to implementation difficulties as well as due to the decision to establish Y4L instead.

2.2.2 Khanyisa

Although Shine pivoted away from SLH due to COVID-19 and the school closures, Shine had already considered changing their model, as the Khanyisa programme had been running between 2017 and 2018. The driving forces behind Khanyisa were two-fold. Firstly, the understanding that all children needed access to literacy support, and secondly that the vast unemployment levels of youth could be harnessed for supporting children in schools.

Addressing the need to support all children was not possible with SLH due to the reliance on volunteers and the time intensity of the programme, making it challenging to scale. Instead, Khanyisa relied on stationing a young person within the classroom and creating a 'reading corner' for one-on-one interaction. Khanyisa was implemented in 24 schools in 2017, dropping to 11 schools in 2018. All Khanyisa schools were not previously receiving SLH. Khanyisa reached 3539 children in 2017. Although Khanyisa was discontinued due to implementation challenges, it was later picked up again in 2021 under the new name 'Youth for Literacy' which is a sub component of the Creating a Culture of Reading at School programme discussed below.

Khanyisa (and Y4L) retain many of the core SLH components, but they are also different in some important respects listed below. In Khanyisa (and Y4L):

1. Shine does not use volunteers but instead recruits **unemployed matriculants, known as Reading Partners**. Requirements of Reading Partners include a matric certificate, police clearance check and an interview to determine suitability, which includes their reading fluency.

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[8] That is, with a set model which did not vary between implementation sites
[9] Although all schools were impacted by the pandemic, this refers to schools which were affected by SLH closure specifically.

They are paid just above minimum wage[10] and trained 3-5 days before entering classrooms (as opposed to the 4 hours of initial and then ongoing training in SLH). Khanyisa and Y4L thus supports another major South African challenge: that of unemployed youth. Volunteers differ from Reading Partners in a number of key respects. Firstly, Volunteers were anyone willing to give their time (they tended to be retirees, students, or homemakers who had children of their own and were highly motivated and educated to help learners to read), while Reading Partners are specifically unemployed matriculants. Secondly, volunteers gave up only a few hours of the day while Reading Partners are stationed in a classroom throughout normal school time. Thirdly, volunteers were unpaid whereas Reading Partners receive a low wage.

2. The Reading Partner remains in the classroom with the children **all day**[11] doing various activities (as opposed to SLH's volunteers who came for an hour):

   a. Reading Partners pull children out of normal class time to read with the reading partner in designated 'reading corners' set up in the classroom. The focus in the 'reading corner' is on **Paired Reading** rather than the other SLH activities. The reduction in activities dilutes the offering children receive in SLH, but enables the Reading Partner to interact with more children.

   b. Reading Partners read to the **whole class during Shared Reading**.

3. Finally, **all learners** in the class benefit from the Reading Partner in the classroom, rather than only those who scored lowest on competency tests at the beginning of the year as is true in SLH.

Similar to the SLH programme, schools participating in the Khanyisa (and Y4L) programmes are provided with **storybooks** and readers for children in the reading corner.

Hence, the Khanyisa programme (and Y4L) have 5 key components: (1) recruiting and training youth, (2) working with all children in a classroom, (3) Shared Reading to the whole class, (4) Individual Paired Reading, and (5) books.

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[10] Reading Partners are not paid by Shine. They are paid by YES, or other similar public-private employment initiatives.

[11] In the case where Reading Partners are only employed part-time due to limited funding, they spent only the morning in classrooms.

2.2.3 Creating a Culture of Reading at Home

With the onset of the pandemic, and especially when school closures were greatest in 2020, it became important to ensure reading at home was prioritised by all children, not just those in SLH. Hence Shine created a new programme, 'Creating a Culture of Reading at Home'. Here, all children receive take-home packs. In 2022, 15 172 children in 46 schools received packs. This programme is currently still running in 2023, however, due to funding concerns, only Chapter schools will receive packs from Term 2 2023 onward (5100 children in 22 schools).[12]

These packs initially consisted of (1) a children's magazine called The Little Issue which is filled with Department of Basic Education endorsed games, stories and activities; (2) a Shine Literacy game with dice and counters; (3) a storybook; (4) a parent pack filled with information and tips to help parents support their children's learning; (5) Wordworks TIME pack; (6) links to the Talking Stories App where 30 readers can be downloaded; (7) stationery pack of crayons, pencils and a drawing book; and (8) a deck of cards.

The packs were distributed termly in 2021 and 2022, after initially being distributed as a single pack in 2020. In that first year, the packs were not standardized and they didn't go out to all schools involved with Shine. Funding from Allen Gray in 2021 and 2022 allowed the packs to be distributed termly to all schools in a standardized way. Although Shine works primarily with Grade 2s and 3s, during 2021 and 2022 this funding also allowed them to distribute Wordwork's TIME packs to Grade 1s and Grade Rs. However, due to budget cuts in 2023 the packs have changed again. As of 2023 March, the pack contains a pencil and a magazine with stories and activities in it. Grade 1s and Grade Rs will continue to receive TIME packs but only in Chapter schools. Shine sends out weekly messages to schools for parents. These messages regard the use of the Shine packs, and are passed on from school personnel to parents.[13]

Later in the pandemic, in 2021, Shine also launched their mobi-site, which consisted of zero-rated access to audio and visual storybooks in multiple languages. Access to the mobi-site was encouraged through messages sent to teachers who were then asked to relay the information to parents. Shine also promotes the mobi-site in their newsletter and on social media. Within the first 6 months of launching the site saw activity from 25 000 users. The site was originally zero-rated, but Shine has not been able to secure zero-rating currently. Shine

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[12] Including Grade R and Grade 1 children, who receive Wordorks packs.

[13] Wordworks does the same for Wordworks packs in Grades R and 1.

piloted three months of reverse billing and saw 7000 users over December 2022. However, Shine had to cap the billing and take down certain activities that were data heavy. At this time Shine still uses reverse-billing and they currently have around 1000 regular users per month in February 2022.

To further encourage use of the mobi-site content, Shine enlisted the use of the app Moya. Anyone using Moya can send messages through the platform for free. The app also has a discovery page with various topics such as mental health, banking, and education. Shine does not run Moya. When it was zero-rated, the mobi-site was represented on Moya, which has roughly 4 million users. However, after the zero-rating was lost, reverse-billing for content on Moya became too expensive and had to be discontinued after four days. .

The Creating a Culture of Reading at Home programme therefore has 2 elements: (1) take-home packs, and (2) the mobi-site or app.

2.2.4 Creating a Culture of Reading at School

With many schools reopening fully in 2021 after the COVID-19 related school closures, Shine saw:

- The reduced school attendance meant many more learners needed literacy assistance
- The country-wide youth unemployment crisis had deepened due to job losses associated with the pandemic

Shine therefore launched 'Creating a Culture of Reading at School'. This programme included the Community of Practises and other literacy-focused activities that Shine had already been running pre-COVID as well as Y4L in the place of SLH:

- Literacy support
  - Communities of Practice - bringing together partner schools to learn from one another.
  - Encouragement and support of school literacy activities and events[14].
  - Training in Book Buddies Programme.[15]

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[14] For example, one school had a World Book Day event in April 2022 and Shine attended and sponsored part of the event.
[15] Book Buddy is a 1:1 reading program that pairs adult volunteers with preschoolers for regular reading. It is essentially Paired Reading but at the Grade R level.

- ○ Linking schools with NGOs providing libraries such as Breadline and Biblionet.
- Y4L
  - ○ This is the reading partner aspect of the programme.
  - ○ It is identical in aim and began identically in implementation to Khanyisa (the name changed due to a naming conflict with another programme). See the section above on Khanyisa for full details.
  - ○ The main difference with Khanyisa is that since 2022 Shine has partially leveraged the Presidential Youth Employment Initiative (PYEI) in which the Department of Basic Education employs Teacher Assistants. Shine uses the Teacher Assistants as the Reading Partners instead of Shine recruiting and hiring all the Reading Partners themselves. This was due to difficulty securing funding for Reading Partners. 2022 saw a mixture of Shine recruited Reading Partners and TAs.[16]
  - ○ Although the Teacher Assistants are recruited by the PYEI and not Shine, they have similar requirements to those for Shine's Reading Partners (matric and police clearance). In addition, they should live within 5km of the school and not be studying or have any other commitments during the week. Teacher assistants are trained by Shine for a full day and also receive 3-6 support visits during the school year from Shine employees. In addition, the WCED mandates that TAs are trained by Funde Wande's online Reading for Meaning programme. In total they require 40 hours of training for TAs. Reading corners (stocked by Shine)[17] are still an element of this programme and Teacher Assistants commit to Shine to spend 50% of each school day supporting literacy.
  - ○ Shine closed the Y4L programme in 2023 (no longer recruiting or employing any Reading Partners of their own) but continued with the broader programme or Creating a Culture of Reading at School in which they use the Teacher Assistants as the Reading Partners.

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[16] Although the TAs were trained as Reading Partners and both TAs and teachers agreed that TAs would spend half their time reading to children, Shine found that in many schools the teachers did not let the TAs do Shine activities.

[17] Schools utilise reading corners stocked by Shine in 2022 or previously. No new classrooms were stocked in 2023.

In terms of reach, the schools which had previously received SLH under the Shine Centres (6 schools)[18] as well as some of the schools previously receiving the Khanyisa programme (11 schools) received the new Creating a Culture of Reading at Home programme in 2021 (total of 17 schools). There were 3880 learners receiving the programme in 2022. In 2023 the total schools were reduced to 16, but 10 new schools requested training for TAs as well, making 26 schools in 2023. Shine also plans to train TAs in an additional 4 schools as well as in three non-profit organisations working with children (one of which hosts more than 1500 TAs in the Eastern Cape). As mentioned, due to not all schools having received Teacher Assistants as of February 2023, the total number of learners supported in 2023 is not yet clear.

Taken together, it is less straightforward to outline the elements of the Creating a Culture of Reading at Home programme. Under Y4L there were 5 components as in Khanyisa, in addition to the CoP. The Teacher Assistant aspect has 6 key components, namely (1) training Teacher Assistants, (2) generating agreements to spend 50% of class time on literacy, (3) working with all children in a classroom, (4) Shared Reading to the whole class, (5) Individual Paired Reading, and (6) books.

Securing payment for Reading Partners has been difficult in both the Khanyisa and Y4L programmes. The Khanyisa programme was halted after 2018 for this reason - the programme lost funding from the Job Fund for Reading Partners part-way through 2018.[19] While payments for Reading Partners are available from funding partners such as Yes4Youth, YearBeyond, and Youth@Work, generally these are reserved for work where the youth will later be absorbed into the organisation hiring them, or for projects with much higher numbers of youth being employed. Even when payments are secured, they are often very low[20], resulting in potential loss of Reading Partners down the line if they find alternative employment.

Y4L encountered similar funding challenges. Shine applied for payments for Reading Partners to Youth@Work for 130 youth and received only 30 by the start of 2022. They did receive additional funds in July from Year Beyond, for the

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[18] There were 7 schools receiving SLH by Shine Centres, but one school transitioned to a Shine Chapter in 2021.

[19] This occurred in the third term of the year.

[20] This is dependent on the funding partner but in 2021 YearBeyond paid Shine Reading Partners R1484 per month for 16 hours work per week and Youth@Work paid Shine Reading Partners R4500 for a full-time position.

Reading Partners to work part-time, at less than half the full-time payment previously secured. However, of the 101 part-time Reading Partners they trained under this funding, they lost almost half (40 youth) by the end of the year due to Reading Partners who were students dropping out at exam time, or being disincentivised by the low payment. In addition to the difficulties around securing payments, once secured they pose an administrative burden due to the level of proof of work required by funders.

Shine started utilising Teacher Assistants due to the implementation challenges of Reading Partners under Y4L. Shine trained 185 TAs in 2022. Working with Teacher Assistants already in classrooms allows for daily literacy focus in the classroom without the burden of securing payments. However, this programme is not without its challenges. Since the Teacher Assistants are not employed by or affiliated with Shine, it is not certain they will focus on literacy for the agreed half-day and not all schools have Teacher Assistants the whole year. Moreover, teachers sometimes become barriers to the TA programme: It was seen that at times they do not let TAs conduct Shine activities given that they are not Shine employees.

These disruptions affect both the experience of learners with the Y4L programme as well as the ability to evaluate it. Throughout implementation, learners inconsistently received literacy support from either Reading Partners or TAs, with this changing over time not only between participating schools but also within schools themselves. For example, a learner could have initially received support from a Reading Partner in 2021, then have received support from a Teacher Assistant in 2022, and later received support from a part-time Reading Partner in 2022, and finally they may have not as yet received any support in 2023 given that some schools are still waiting to receive TAs. Some learners would have had more consistent support but the constantly changing factors limit the ability to determine reliable programme effects. As the Y4L programme was not implemented uniformly means it is very challenging to evaluate the programme.

2.2.5 Programme summary
Table 1 below summarises each programme's duration, reach, and components.

Table 1: Shine programme's duration, reach, and components

Programme	Max annual reach	Literacy partner	Training	Material support	All children	Teacher training	Parent W/shops	Shared Reading	Paired Reading	Writing	Games
SLH 2001-2021 (Chapters ongoing)	*(2019)* **overall**: Learners: 1920; Schools: 34 **excl. chapters:** Learners: 440; Centres: 6; Schools: 7	Volunteers	4 hours + ongoing	Books, games, (targeted classroom)		✓	✓	✓	✓	✓	✓
Khanyisa 2017-2019	*(2017):* Learners: 3539; Schools: 24; Volunteers: 87	Reading Partners (hired by Shine)	3-5 days	Books (reading corner)	✓	✓	✓	✓	✓		
CCRH 2020 - ongoing	*(2022, term 3)* Packs: 14212; Schools: 46 **Mobi:** 1000 users per month			Take-home pack and online repository of stories	✓					✓	✓
CCRS 2021 - ongoing	*(2022)* In Y4L: Learners: 3880; Schools: 20	Reading Partners (hired by Shine); Teacher Assistants from PYEI	RP: 3-5 days TA: 1 day + 3-6 days ongoing	Books (reading corner)	✓	✓	✓	✓	✓		

2.3 Data Collected and Evaluations Conducted

Shine Literacy conducts extensive internal M&E but has only had one programme evaluated by an external M&E specialist.[21] The majority of Shine's internal evaluations have been qualitative and where quantitative, purely descriptive. However, data collected under SLH were used by a masters student at the University of Cape Town using an impact evaluation design in 2014 (Schkolne, 2014). A description of the M&E to-date per programme is discussed below.

- **SLH:**
  - **D1 and WELA:** Initially, Shine developed their own test (called D1) which was used within Centres and Chapters. This was administered from approximately 2007-2013. The test was developed between Shine and a UCT remedial education lecturer. Shine administered D1 according to teacher recommendations. It was used as a screening test to see which children should participate in SLH. D1 was administered a second time 6 months later to assess progress. The data were not compiled into an evaluation report. Thereafter, Shine chose to use the WordWorks test, WELA, as well as qualitative data to assess eligibility for, and effectiveness of the programme.
  - **Run through Shine's Centres:** These are always evaluated yearly. D1/WELA were conducted at two time points (end of Grade 1 and mid-Grade 2) to determine if children were in need of SLH and progression over the duration of the programme. Children were initially included in SLH if they tested as 'at risk', 'below level' or 'near level' at the end of Grade 1. The mid-Grade 2 assessment determined whether children should continue with SLH (again, if they were not 'on-level'). These data did not include a comparator group (a group of similar children that did not participate in SLH). Shine also conducted surveys and qualitative interviews to assess fidelity of the intervention and experiences of stakeholders. Schkolne (2014) used Shine's exclusion criteria to construct a comparator group of just 'on-level' learners and compared WELA scores between treated and untreated learners. She also compared learners by absenteeism on SLH days to determine the effect of programme intensity.

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[21] There was another external impact evaluation by an M&E specialist but it looked at Shine in conjunction with several other programmes, and supported Mother Tongue literacy rather than EFAL. It also did not isolate the impact of Shine (Mescht, 2018).

- ○ **Run through the Shine Chapters:** These were collected for all Chapters for each year from 2013 onwards. However, these data were not compiled into an evaluation report.
- **The Khanyisa programme:** journals kept by Reading Partners and interviews with principals, teachers, and Reading Partners. This led to two evaluation reports, for 2017 and 2018.
- **Creating a Culture of Reading at Home** had the packs evaluated using focus groups with parents. This was for internal-decision making around which elements of the packs to continue with after funding made the full pack unaffordable. The mobi-site is continually assessed by observing usage data, although neither of these activities led to evaluation reports[22].
- **Creating a Culture of Reading at School:**
  - ○ The **Y4L** programme collected the following quantitative data: Early Grade Reading Assessment (EGRA) data administered by teachers; and number of reading sessions per school from Reading Partners and Teacher Assistants. It also collected qualitative survey data from Reading Partners. We comment on the quality of the quantitative data and analyse the data where possible in the sections below.

The findings of these evaluations and their implications for building a knowledge-base around Y4L will be discussed further below.

3. Evidence of Effectiveness

As we are particularly interested in the impact of the Y4L programme, in this section we review the data available for Y4L. We start by analysing the data available for this programme and highlighting the key data limitations. Thereafter, previous evaluations from Shine's other programmes will be discussed to explore what we can learn about Y4L. These include a number from the SLH and Khanyisa. Those of Shine's programmes that offered limited similarity to Y4L (such as the Creating a Culture of Reading at Home programme) or that had no existing data (such as the Teacher Assistant component of Creating a Culture of Reading at School programme) have been excluded from this section.

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[22] Usage data from the mobi-site includes how long the user spends on each page, how they move between pages, where they are located, demographics, and languages. Shine uses this data to determine questions around what content they should be uploading, or if they need to focus on a specific language, for example.

As discussed above, the Y4L programme was not implemented uniformly (some learners were supported by a Teacher Assistant, some by a Reading Partner and many for different durations of the year). This makes it difficult to evaluate and should be kept in mind in the discussion below.

3.1 Y4L Data and Evaluation

The Y4L programme relied on two main types of data, quantitative and qualitative. For quantitative data there were EGRA data and attendance data for reading sessions. EGRA is an international diagnostic reading test administered orally to primary school learners one on one. It takes roughly 15 minutes to administer an EGRA. Competencies of the EGRA typically include alphabetic knowledge, initial sound identification (letter sound recognition, syllable reading, and complex consonant reading), familiar word reading, nonword reading, and oral reading fluency with comprehension.[23] In Shine's case EGRA data were collected by teachers and usually included questions on letter sounds, word reading, passage reading and comprehension. The qualitative data were collected through online surveys for the Reading Partners that Shine administered, as well as documented weekly and monthly site visits of classrooms by Shine coordinators and supervisors respectively. In the case of the site visits, each visit was intended to be documented but this did not happen every time. This documentation was never formally analysed in an evaluation and will not be discussed further here. However, it was used to inform discussion with Reading Partners.

EGRA

Teachers throughout the Western Cape are required to administer the EGRA in term 2 (April) and 4 (October) and submit the data to the WCED.[24] Although there was an agreement in place that teachers at schools that implement the Shine programme would share EGRA data collected for the WCED with Shine, this often did not happen. In some cases the data were collected but not shared, in other cases it appears that the data were not collected at all. Even when data were shared with Shine, there are questions around the quality of that data as it is not clear teachers have the knowledge and resources to adequately implement the EGRA. What follows is an overview of the data that were shared with Shine.

Ideally for an evaluation we would want:

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[23] https://www.education.gov.za/ArchivedDocuments/ArchivedArticles/EGRA.aspx

[24] Note, however, that this is a country-wide DBE initiative.

- Treatment data: EGRA data (disaggregated at least per literacy competency) on a sufficiently large representative sample of programme learners who are assessed before receiving the programme and again afterwards. The programme should be implemented uniformly for all learners.
- Control data: EGRA data on a similar group of learners who do not receive the programme assessed at the same two time periods

There are a number of issues with the EGRA data collected for the Shine Y4L programme.

- **Variation in test administration:** It is unclear that teachers had the ability, experience, time, and motivation to properly administer the EGRA assessment. This is relevant for all EGRA data collected by teachers, not just for this programme.
- **Opaque scores:** The EGRA data only show total score per quiz instead of scores disaggregated to question or competency level. This makes it challenging to assess the validity of the data and make meaningful comparisons to other studies.
- **Incomplete data:** Of the 4 710 learners receiving support under Y4L in 2022, 58% (2743 learners) have no EGRA data whatsoever, 20% (940 learners) have only one EGRA assessment, and the remaining 22% (1027 learners) have two EGRA assessments available. Eight of the schools have no learners with two EGRA assessments. Of the 1027 learners with two EGRA assessments, only 626 learners (13% of the full sample) had EGRA assessments at least one term apart (e.g. the learner was assessed in Term 2 and again in Term 4). These learners come from only five of the 19 schools. While 626 learners is a fairly large dataset, the high level of non-response (87%) and the fact that these learners come from just five schools (a quarter of the total schools) means we cannot plausibly say the analysis represents the average learner or school in the Y4L programme. Indeed, it is likely that teachers who correctly administer the EGRA may be more competent which will influence the learners independently of the Y4L programme; or that teachers whose learners are struggling may choose not to do another EGRA for fear of judgement on their teaching ability.
- **Lack of baseline:** In addition, ideally we would want learners to do the EGRA before receiving any assistance from the Y4L Reading Partners but schools were directed to do the EGRA in term 2 not term 1.
- **No comparison data:** In order to derive meaning from the Shine results we need to compare them to similar children. There are various options for this:

1. Before the programme started, learners could be randomly assigned to the treatment or control group. However, this was not done for this programme.
2. The programme learners could have varying amounts of time with the Reading Partners (ideally this would be random rather than due to teacher or learner choices), and we could compare those with many hours to those with very few; or
3. We could find publicly available EGRA scores for similar learners over a similar time period and use these as the comparison.

We explore option 2 and 3 below. In the second instance, Shine did collect data on reading session attendance occurring in their schools, by asking Reading Partners to report this figure. However, these data were also incomplete.

Of the 1027 learners with two EGRA assessments available, 866 also had reading session data available, but they were represented in only 9 of the 19 schools in which the programme operated. Given school-level clustering of effects, it is highly unlikely that this sample size would be able to accurately detect programme impact. That is, even if there were no other issues with the data and 866 learners were a large enough sample size to detect impact, the fact that these learners are clustered within only 9 schools means that the likelihood of detecting programme effects is severely diminished. Furthermore and critically, this level of nonresponse (11 of 19 schools) suggests that the responses from the 8 schools are unlikely to represent the remaining programme schools. These are likely to be particularly proactive teachers or schools.

On average, these 866 learners attended 37 reading sessions over the year.[25] The Grade 2 and Grade 3 averages were very similar at 38 and 36 sessions respectively. There was limited variation in the numbers of sessions run, which limits our exploration as ideally we want a group of learners with near no hours to use as our comparison group. 6 of the 9 schools with matched data all ran between 32-42 sessions. This further decreased the ability to pick up statistical differences. We therefore do not recommend using the number of reading sessions attended as a way to divide learners into treatment and control.

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[25] Some learners only had Reading Partners from mid-year, others for only a month, and still others throughout the year.

The third option for finding a control group also presented challenges. One could request access to Term 1 and Term 4 EGRA data from the WCED on Y4L schools and other schools in similar areas. Schools would then have to be statistically matched to Y4L schools before a suitable regression design (for example difference-in-difference) could be applied. This would necessitate not only the provision of EGRA scores by the WCED but also background characteristics of schools at minimum, and learners ideally.

Another option was to use publicly available reports such as those from medium sized programmes like those by Funda Wande or the Story Powered Schools Programme. These programmes also used EGRA to evaluate their learners and generally present statistics from a control group of learners similar to those in their programme. The problem with this approach is that these learners took the EGRA at different time periods to the Y4L learners, and are from different provinces. In particular, Funda Wande primarily works within the Eastern Cape and Limpopo and Story Powered Schools work within the Eastern Cape and KwaZulu Natal. It is known that schools in the Western Cape are already more functional than any of those three provinces making comparisons with these provinces difficult.

Funda Wande does however also work within the Western Cape in a collaboration with the WCED. The first evaluation report for their baseline was published in 2022 (Ardington & Henry, 2022). The report lists EGRA scores by subcomponent. There are three problems with comparing these scores to the Shine EGRA scores for Y4L. Firstly, the baseline evaluation was conducted on Grade 1 learners, while Shine works in Grade 2. Secondly, both the Shine schools as well as the Funda Wande schools were intentionally selected, meaning that they are likely to have certain characteristics which distinguish them from the general population of Western Cape schools. The final issue is that, while Ardington and Henry (2022) list scores by competency, the EGRA scores in Y4L contain one overall score. It is not clear that the questions in the Y4L EGRA align in difficulty with those in the Funda Wande EGRA.

The Y4L EGRA data quality issues and the lack of a control group mean we do not recommend analysing these data further. Instead, we turn next to the qualitative data that Shine collected on the programme.

Surveys

Surveys of Reading Partners were administered online and answered by 45 of the 64 Reading Partners[26] in October and November of 2022. Perceived outcomes for learners and the experience of the programme were positive. The survey included seven questions. Two of these asked about learners directly:

- "Share any stories about learners in the space below. The stories can be about academic achievement OR other growth or development."; and
- "Tell us what your class teacher has said about the Y4L programme or the change the programme has brought to the classroom? It can be a positive or a negative comment, but share what your teachers are saying."

Two questions asked about Reading Partners as they relate to the classroom:

- "Share any challenges you have as a reading partner here. Be honest please! If you have dealt with the problem, share how you did that too."; and
- "Is there anything Shine could do differently to support Reading Partners better?"

The remaining three questions asked about the Reading Partners more generally:

- "What have you learned from being a reading partner that you can use in your own everyday life? Please be specific and tell us how your learning has impacted you.";
- "What are your plans for next year, if you have them?"; and
- "How has being a reading partner benefitted you?".

These further three questions were helpful in assessing impact of the programme on Reading Partners, but were not discussed here as the focus was on the programme impact on children.

Responses to the first question were often about how children have improved. Many Reading Partners gave specific examples of learners who had been struggling and were now doing well. Others spoke about the progress of their group as a whole. Responses to the second question were equally positive, expressing the positive attitude that teachers have toward the programme due to its perceived effectiveness.

In the third question, which asked about challenges the Reading Partner faced, the most frequent responses were around discipline and uncooperative children (11 of 46 responses), and children who continue to struggle despite assistance (8 of 46 responses). Other frequent responses included working with teachers who

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[26] There were 97 originally but 64 at the time of the survey.

did not always make time for reading (6 of 46 responses), and there were a few admin issues (3 of 46 responses) such as challenges using the funding partner's app to track time at school, being paid on time, and submitting requests for leave. Although many Reading Partners also stated that they did not have any challenges (8 of 46 responses).

In the fourth question, asking how Shine could improve support to Reading Partners, the most common response was that no improvements were needed (13 of 46 responses). A few Reading Partners asked for patience and understanding about slow progress in the classroom (5 of 46 responses), being patient and understanding when time off was needed (4 of 46 responses), and providing more reading materials (3 of 46 responses).

While this did not provide a measure of impact magnitude, it suggested the programme benefitted learners and highlighted areas that could be improved in implementation:

- Including training on classroom discipline[27],
- Working on relationships with teachers that did not support the programme,
- Minimizing programme admin requirements,
- Making Reading Partners feel understood and supported, and
- Providing additional reading materials.

In the absence of quantitative outcome data for the Y4L programme, we look to the other Shine programmes and their data and evaluations. Since most of Shine's programmes share elements, evidence on the impact of one programme can indicate possible impacts of others.

3.2 Evaluations from similar Shine Programmes
Y4L had 5 key components: (1) recruiting and training youth, (2) working with all children in a classroom, (3) Shared Reading to the whole class, (4) Individual Paired Reading, and (5) books. All of these components overlapped with Khanyisa. Four of these components (training, Shared Reading, Paired Reading, books) overlapped with the components of SLH - although in SLH it was volunteers who were trained rather than Reading Partners and Shared Reading was individualized while in Y4L it was delivered to the whole class. The programmes also shared the

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[27] Since 2021 Shine has incorporated a Positive Discipline workshop into their training which is being SACE accredited. However, these responses were from 2022 and Reading Partners were therefore already trained in this manner when they reported this.

Shine TOC and Shine Ethos. Given the overlaps it made sense to review the evaluations of SLH and Khanyisa to see what we could learn about Y4L.

3.2.1. SLH Evaluations

The SLH programme collected learner assessment data, learner attendance data, and qualitative interview data with principals, teachers, and parents. Collecting literacy data was central to the SLH programme as early literacy outcomes were used to determine programme inclusion. For each year that SLH was running in centres, WELA data was collected at the end of the Grade 1 year and 6-months post. Learners who did not score 'on level' before starting Grade 2 are eligible for SLH.[28] The second assessment was used to determine progress. A learner who was still not 'on level' after 6 months could continue with SLH.[29] Reviewing SLH data for Chapters and Centres over 2015-2019 indicates that there was consistently a substantial increase in WELA scores after 6 months with SLH. Shine Chapter data from 2022 indicates lower but still substantial increases (Shine Literacy, 2022).

While there was no strict comparison group to compare increases in scores to[30], we could use publicly available data to deduce a comparison. The WELA categorised learners into 'at risk', 'below level', 'near level', and 'on level'. It was not clear from WELA documentation (O'Carroll, Matzdorff, & Hugow, 2005) how these categories compared with other categorisations such as being able to read for meaning (i.e. being able to construct meaning from text). However, we could try to compare with the Progress in International Reading Literacy Study (PIRLS), or the EGRA measure of how many words a child could read correctly per minute.

At the start of Grade 4 learners should be able to read for meaning. At a national level in South Africa, as of 2016, 78% of children could not read for meaning in any language at the start of Grade 4 (Mullis, O. Martin, Foy, & Hooper, 2017). It is hard to imagine many of these children would be categorised as 'on level' in Grade 2 by any measure (including the WELA).

Various researchers have used the EGRA results to benchmark what level learners should be at different grades. Learners taking English as a first additional language should be able to read 30 words correctly in a minute at the end of Grade 2 and 50 words correctly by the end of Grade 3 (Wills, Ardington, Pretorius,

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[28] Not all eligible learners are included in SLH. This depends on the number of volunteers available.

[29] Although in practice, many continue either way.

[30] Theoretically, the same exercise conducted by Schkolne (2014) could be reproduced for Shine Chapters. However, this has not happened as yet and doing so falls beyond the scope of this report.

& Sebaeng, 2022). Various EGRA type studies from 2017 to 2021 representing 6 provinces in South Africa indicate that median words correct in a minute was 11 for Grade 2 learners and between 13 and 34 words for Grade 3 learners. Amongst non-Grade-repeating learners, between 19% and 34% of Grade 3 learners were achieving the 50 correct words per minute benchmark. Clearly the majority of learners fell far below the benchmarks.

Hence, although we did not know for certain what the mid-Grade 2 WELA scores would look like in the absence of Shine's literacy programme, we could assume the majority would not be 'on-level' given what we know about the national state of literacy.

Consistent with the national challenges in literacy, in the 2019 Shine data (Shine Literacy, 2019a), baseline scores indicated that only 15.5% of learners were 'on level' or 'near level' at the start of Grade 2. This was only 6% in 2022 for Shine Chapters (Shine Literacy, 2022). The 6-months post assessment indicated that 61% of learners were 'on level' or 'near level' after participation in Shine in 2019 (Shine Literacy, 2019a). In 2022 this was 37% in Shine Chapters (Shine Literacy, 2022). While some increase was naturally expected over the course of the school year, the magnitude of the difference suggested that the SLH programme had a positive impact on literacy outcomes. The drop from 2019 to 2022 is likely due to the influence of the COVID-19 pandemic.

In 2018 Volkswagen Community Trust published a report (Mescht, 2018) comparing pre- and post- EGRA scores for learners in five schools receiving a mix of SLH and other literacy programmes (such as Rhodes University's Centre for Social Development, Edufindi, and Nal'ibali). All learners were receiving support in isiXhosa. There was no comparison group, but EGRA scores after 6 months of literacy support showed that a higher proportion of these learners could read for meaning in all Grades than was true for the national average in South Africa (although the report did not state what that proportion was).

Most convincingly, a 2016 Masters paper used Shine's WELA data to evaluate the impact of the SLH intervention. Schkolne (2014) compared WELA outcomes for learners who were 'near level' at the start of Grade 2 and received SLH to learners who were on the cusp of being 'on level' and found that SLH had a significant positive impact on outcomes. The author also analysed programme intensity by looking at absenteeism of learners during the intervention and again found a significant positive effect of more programme exposure. This was concrete evidence that SLH improved outcomes for learners. Although many separate analyses were run, overall it could be said from this research that those involved

with SLH for 6 months saw an increase in WELA scores of 32% above their peers not in the programme. Unfortunately, it was not possible to say how this might translate to other assessments such as EGRA.

Furthermore, the qualitative data (Shine Literacy, 2019b) suggested that teachers, principals, and parents saw a lot of value in the programme.[31] This further corroborated the indication that SLH had a positive impact.

Overall, these data indicated SLH positively impacted learner literacy. However, it was not possible to determine which components of SLH were most impactful.[32] Although the implementation of Y4L was very different to SLH, the core components of access to materials, Paired Reading, Shared Reading, the Shine Ethos, and training (in some form) remained the same. If it can be demonstrated that these components were driving factors behind SLH impact then some overlap in the efficacy of SLH and the other programmes could be assumed. However, the fact that the SLH volunteers and Reading Partners differ substantially to each other (the former reportedly more educated and motivated than the latter) one would need to check that the core components of the programme are being delivered in a similar way in SLH and Y4L.

3.2.2. Khanyisa Evaluations

The Khanyisa programme was evaluated twice, in 2017 and 2018. Neither evaluation was a quantitative outcome evaluation. The evaluations were light-touch and did not appear to explicitly utilise the TOC to come up with research questions around implementation fidelity or outcomes achieved.

The Khanyisa evaluations used Reading Partner journals (recording the number of books read for both Paired and Shared Reading and described highlights) as well as qualitative interview data with principals, teachers, and Reading Partners. The focus was to ascertain implementation efficacy, individual experience of the programme, and some perceived impacts on outcomes.

The key findings from the 2017 report were that (1) using relevant reading material was key, (2) reading pleasure in children increased over the course of the programme, (3) children had more reading opportunities while involved in

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[31] Analysing all of the Shine Literacy qualitative data is beyond the scope of this report. However, the 2019 Shine annual report (Shine Literacy, 2019b) provides evidence of this suggestion.

[32] One way to determine this could be leverage the fact that Shine Chapters have been implementing different versions of the SLH model since the COVID-19 pandemic. Analysing WELA results alongside implementation practices could therefore highlight component impacts. This analysis falls beyond the scope of this report, however.

Khanyisa, (4) Reading Partners benefited by gaining confidence in their own abilities, and (5) Teachers appreciated the support. While this insight was useful from an organisational perspective, it must be emphasised that these results were perceived and not quantitatively measured. One therefore could not assume from this alone that there was a significant impact on literacy outcome for learners. Rather this evaluation helped unpack how and why changes in literacy may have occurred.

However, given that Khanyisa drew on SLH elements in its implementation, there was suggested evidence that this programme should work to improve learner outcomes. Coupled with the overwhelmingly positive views of stakeholders, it was not a stretch to imagine that many learners benefitted under Khanyisa.

Hence, regarding Y4L, Khanyisa added to the analysis by providing suggested evidence of increases in outcomes. Critically, this was relevant for the case where Shine's literacy programme is delivered under the Khanyisa (or Y4L) approach.

3.4 Overview

The discussion above highlighted four things: (1) the Y4L EGRA data were unsuitable for any kind of interpretive analysis, (2) it was likely that many learners benefitted from SLH, (3) the relative importance of different SLH components could not be ascertained from this evidence alone, and (4) perceptions of the various programmes were very positive.

Given the relative difficulty of assessing the importance of the Shine ethos and the training from a data-naive standpoint, what follows we explored the possible impacts of access to books, Paired Reading, and Shared reading from other programmes.

4. Evidence from Similar Programmes

The discussion below provides an overview of the effectiveness of programmes in South Africa which are similar to Shine's Y4L. Our aim is to see what this evidence means for our understanding of Y4L's impact. We start by discussing programmes such as Room to Read, Funda Wande's Teacher Assistant programme in Limpopo, and Nal'ibali's Story Powered Schools, which have some similarities to Shine's Y4L and have external evaluations which are publicly available. Next we review programmes that resemble Y4L more closely, namely Wordworks and Help2Read. These lack external quantitative impact evaluations but we report on the evaluations that do exist in the public sphere

4.1 Programmes which were rigorously evaluated but differed fairly substantially to Y4L

Room to Read supports learner literacy in Asia and Africa, including South Africa, and provides primary school learners with access to reading materials (as Y4L does), but also conducts extensive teacher training, coaching, and provides lesson plans and engages families, communities and government in education reform (although Creating a Culture of Reading at School does engage communities, this goes far beyond the mandate of Y4L). Various evaluations have been conducted on Room to Read programmes, for instance they reported that through their programme, Grade 2 learners in Zambia saw their reading fluency increase 2.5 times relative to the control learners over a two year period (Alexander, Kwauk, & Robinson, 2016). However it was not possible to say how much of the impact of Room to Read was due to the improved access to books and opportunities for reading, and how much to the potentially improved teaching quality in general.

Similar to Y4L, **Funda Wande's Limpopo Teacher Assistant** programme not only provided reading materials but also had a direct focus on Paired Reading and Shared Reading activities, and utilised otherwise unemployed youth stationed in a classroom who worked within a reading corner. Funda Wande even consulted with Shine when designing its own programmes. However, Funda Wande also provided Learner Activity Books and Teacher Guides which together guided and replaced standard teaching practices. Funda Wande recruited and employed their own Teacher Assistants (i.e. not those employed by the DBE). The Funda Wande Limpopo programme reported that after 2 years of the intervention, Grade 2 learners outperformed their control group peers by 1.25 years of learning, and were twice as likely to reach the DBE's learning benchmark for Sepedi (Ardington, 2023). Again however, Funda Wande's impact could not only be attributed to the elements of the programme which were similar to Y4L, but rather to the cohesive package Funda Wande offered.

Nal'ibali is a South African reading for enjoyment non-profit. Nal'ibali has a number of interventions depending on the context: programmes for preschool learners, schools, the home, and the community. In their school intervention, **Story Powered Schools**, storybooks were provided to the class or school, teachers were trained on how to increase reading time inside the classroom, they held story festivals, encouraged writing skills, and involved parents through workshops, training, and support.

While this programme had some similar aspects to Y4L, the lack of a dedicated volunteer, Reading Partner, or Teacher Assistant whose focus was on Shared or Paired reading with learners meant it differs to Y4L. However the Story Powered Schools' evaluations explored the impact of the different components of the programme which was valuable for Y4L.

The Story Powered Schools intervention was evaluated over 2017-2019 using a Randomised Control Trial (RCT) design. A review of the baseline report (Menendez & Ardington, 2018) indicated that the study was rigorously designed. The baseline report examined EGRA outcomes for learners in a regression design controlling for school and learner background characteristics. They found that EGRA scores in English were significantly positively related to having books in the home and a library at school in the Eastern Cape, but not in KwaZulu Natal. This indicated that access to learning materials could positively impact learning outcomes, but that the relationship was context specific. Unfortunately, the baseline report did not explain why access to materials were related to literacy scores in the Eastern Cape rather than KwaZulu Natal. But this indicated that access to materials did not always lead directly to improved literacy.

The endline report provided a similar conclusion for these purposes. Overall, there was no evidence that Story Powered Schools were associated with increased literacy (Ardington, Hoadley, & Menendez, 2019). The authors discussed how the lack of impact was probably related to a mix of implementation issues, low uptake by schools, and programme limitations. Implementation issues included infrequent support visits to schools and infrequent use of reading clubs. Low uptake by schools was seen through a lack of support by teachers and in schools not fulfilling minimum and even low-effort expectations. Programme limitations included the fact that the program planned to hold activities before and after the school day or during breaks but this was clearly not possible. This sparked resentment by teachers when activities crowded out teaching time. The school's literacy support officer - or 'Story Sparkers' - had low pedagogical knowledge and high autonomy and as a result often spent time in Reading Clubs on non-reading activities such as singing and cutting.

While it was encouraging that externally evaluated programmes such as Room 2 Read and Funda Wande's Teacher Assistant programme, which included aspects of Y4L, have been shown to positively impact learner literacy, it was clearly not a simple process whereby literacy support always led to improved literacy outcomes. Literacy programmes need to be designed with evidence-backed components in mind, but they also need to ensure stakeholder buy-in and implementation fidelity.

4.1. Programmes which were fairly similar to Y4L but lacked rigorous evaluations

4.1.1. Wordworks

Wordworks is non-profit with a collection of early literacy programmes aimed at Grade R and Grade 1. Wordworks programmes for Grade 1 are often paired with Shine Literacy for Grades 2 and 3 in schools. Although both organisations target literacy as their main outcomes, most of the programmes are only mildly similar, with the exception of the Ready Steady Read Write programme which is very similar to Y4L. TIME (Together in My Education) and Every Word Counts also displayed some similar features.

Although it is not represented on their website, Ready Steady Read Write is Wordworks' tutoring programme. This programme is very similar to Y4L in that it involves training tutors to work with pairs of learners for at least 6-months; the tutors are mostly volunteers from the community; and the lesson follows a structured approach including reading, writing, and games.

A paper has been written on the Ready Steady Read Write programme (O'Carroll, Matzdorff, & Hugow, 2005). but unfortunately it focused on the WELA assessment[33] rather than evaluating the impact of the programme itself. A note in the conclusion however suggested that the intervention saw improvements in the Grade 3 pass-rate of learners in intervention schools. In addition to this, a presentation was sent to Firdale through Shine which suggested that an impact evaluation of this intervention took place. The presentation included a graph showing a comparison of control and intervention groups scores on WELA and the caption indicated that the difference between the two was significant. No detail was given on how this evaluation was conducted and we recommend following up with Wordworks to learn more about this evaluation and what can be learnt for Y4L.

There were evaluation reports for other Wordworks programmes, such as TIME (Wordworks, 2022a; Wordworks, 2022b) and Every Word Counts (Stefano, Hermanus, & Biersteker, 2016). Unfortunately, the evaluation reports of these programmes were purely qualitative and largely implementation-focused and did not include even perceived impacts on literacy outcomes. We therefore cannot use these to gather evidence for Y4L.

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[33] The purpose of the paper was to analyse whether the WELA is an appropriate tool with which to measure literacy outcomes.

Help2Read is another early literacy intervention and like Y4L, they work within public South African schools. Help2Read also uses either volunteers (Reading Helpers) or otherwise unemployed adults (Literacy Tutors) who provide 30 minutes of one-on-one reading support to learners twice weekly; they provide literacy training to volunteers, teachers, and caregivers; and they provide access to storybooks.

Activities during Help2Read programme time include reading, comprehension, identifying letters, words and sounds, and playing literacy games. Although it is not clear from the Help2Read website nor documentation available[34] whether the reading support time involves Paired or Shared Reading, from a video available on the website Paired Reading can be briefly observed.

This programme was very similar to Y4L. The Help2Read website stated that their programme saw 68% of learners reading at or above grade level. It was not clear whether this statistic was relevant for both Reading Helpers and Literacy Tutors, nor how grade level was determined, nor how this figure was calculated. However, given that only 22% of Grade 4s could read for meaning in South Africa in 2016, this suggested the programmes were delivering much better results than true for the average learner. In an evaluation of Help2Read's monitoring data, Joffe (2015) found a statistically positive effect of the programme on literacy scores.[35]

Y4L and Help2Read were very similar in implementation model. We recommend reaching out to Help2Read to learn more about this evaluation to see whether it can tell us more about Y4L's likely impact.

5. **Guidance by Best Practice**

Shine Literacy's programmes are based both on their on-the-ground experience as well as drawing from the relevant evidence-base around what works in supporting early language and literacy learning. Shine's report, "Creating a Nation of Readers", was a survey of evidence compiled by Rebecca Hickman (2018), and included both an overview of evidence-based literacy practices as well as the ways in which Shine incorporated this evidence base into their programmes including

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[34] Including documentation on the website as well as Grigg et al. (2016).

[35] This assessment does not appear to be an EGRA nor a WELA, and it is not explicitly named.

Y4L. This was important because it demonstrated that Shine activities are based on already-researched and well-documented approaches to teaching literacy.

5.1 Knowledge of the classroom

Shine activities firstly take into account the business-as-usual state of South African classrooms. Research by Ursula Hoadley in 2012 showed that classrooms in the country were characterised by a lack of opportunity to handle books, limited teaching of reading and writing, children were reading isolated words rather than extended texts, a focus on decoding rather than comprehension, little-to-no elaboration on learner responses, communalised rather than individualised instruction, little formal teaching of vocabulary, spelling, and phonics, a lack of good print material, and children learning in a language other than their home language.

Although Shine started in 2001 and this research was conducted in 2012, Shine's programmes had been designed to address these gaps since inception. This was done by providing access to quality reading materials, and training volunteers, Reading Partners and Teacher Assistants to work individually with children, to provide relevant feedback, to introduce and familiarise children with extended texts, and to include a focus on comprehension as well as phonics.

5.2 Reading for pleasure

According to the report (Hickman, 2018), reading for enjoyment was an integral part of becoming a strong reader. The author drew on a wealth of evidence to argues that enjoyment and motivation were closely linked, and that honing the relationship between reading enjoyment, skill, and motivation, might be one of the most critical keys to learning to read (Clark & De Zoysa, 2011; Commission on Reading, 1985; Education Endowment Foundation, 2017; Howie et al., 2017; Juel, 1988; Masten, 2010; Sullivan & Brown, 2013; The Reading Agency, 2015; among others).

Hickman went on to argue that reading for pleasure was at the heart of Shine Literacy practices. The author informs us that in training, volunteers and Reading Partners learnt about the importance of fostering a love of reading in children, and were encouraged to help children see reading as an exciting process of making meaning rather than the mastering of specific skills. Volunteers and Reading partners encouraged discussion and interaction around books and they were trained to ensure the learning environment was fun and informal. This

ensured that all children could experience success. With the Khanyisa and Y4L programmes, teachers also attended a workshop on creating a culture of reading. Here they encountered practical ideas and strategies to increase children's enjoyment of the learning-to-read process.

5.3 Access to books

Learning to read without any reading material is a very difficult task. In South Africa, learners often have little-to-no access to books. Most households in South Africa have no books at all (DG Murray Trust, 2015; Snyman, 2016) and most schools do not have a library (DG Murray Trust, 2015; Spaull & Hoadley, 2017). Public libraries are also not in reach for upwards of 80 percent of the population (DG Murray Trust, 2015; Snyman, 2016). Even when school libraries do exist, they are often unsuitable for emerging readers (DG Murray Trust, 2015; Spaull & Hoadley, 2017).

Children need access to books and access to appropriate books. Children are far more likely to develop a love of reading if the books they are exposed to are meaningful to them, and relate to their own experience (Commission on Reading, 1985, Department for Education, 2012; . Gambrell, 2011; Murris; 2016).

At Shine, provision of engaging, appropriate, and fun reading material is a critical component of all Shine programmes.

5.4 Dual emphasis on decoding and comprehending

In order to learn to read, children need to learn two overarching fundamental skills. Decoding refers to the ability to translate written words into the sounds of spoken language, while comprehension refers to the ability to understand the meaning of these sounds. Research has shown that children need to learn these two skills simultaneously rather than sequentially (Krashen, 2009; Verbeek, 2010). Therefore, the most effective reading programmes teach both of these skills. Shine follows a balanced approach which treats these skills as equally important and fundamental to learning to read (which is often not the case otherwise and within schools specifically).

5.5 Shared Reading

Evidence suggests that reading aloud to children is a way to stimulate interest in books and stories and introduce them to vocabulary and grammar with a very low

skill requirement for the child (Krashen, 2018). Reading aloud also builds oral language skills (O'Carroll & Hickman, 2012), introduces children to the structure and elements of narrative (O'Carroll & Hickman, 2012), helps to build empathy (O'Connor, 2014), allows engagement with books above their own reading level (O'Connor, 2014), exposes children to abstract, decontextualised language that is not typically part of oral conversations (Bus et al., 1995), and introduces children to linguistic devices such as figurative language (O'Carroll & Hickman, 2012). Additionally, there is evidence to suggest that the ability to understand written language orally precedes the mechanical skill of decoding print (Bus et al., 1995).

According to the Commission on Reading report published in 1985 (as cited in Hickman, 2018), "the single most important activity for building the knowledge required for eventual success in reading is reading aloud to children." Hence, enjoyment can be thought of as the key to motivation, and reading aloud can be thought of as the key to fundamental reading skills.

In Shine, Shared Reading (or reading aloud to a child or the class) is a central component of every Shine programme. While SLH is more comprehensive in terms of the activities conducted, Shared Reading is not compromised in any Shine setting. Shared Reading takes place during the SLH in the SLH programme. Shared Reading takes place daily with the whole class in the Khanyisa and Y4L programmes. During training, volunteers and Reading Partners are taught how to facilitate discussion before, during, and after story-telling. They are trained to use comments and open-ended questions to encourage reflective analysis, vocabulary, and exploration of meaning.

5.6 Paired Reading

Paired Reading is the centerpost of the Shine programme and it also has extensive evidence showing its effectiveness in developing reading comprehension, accuracy, and fluency (Cadieux & Boudreault, 2005; Rasinski, Fredericks, & Rasinski, 1991; Topping, 2014; National Reading Panel, 2000). In addition to the wealth of evidence on the effectiveness of Paired Reading, evidence also suggests that Paired Reading is most successful when children have access to engaging reading material that is relevant to their lives, where they are able to choose their own reading material, where discussion is facilitated with reflective and open-ended questions, and where adults offer encouragement and recognition of progress (Topping 2014).

Paired Reading takes place in every SLH and Reading Partners conduct Paired Reading daily with children in Khanyisa and Y4L. Furthermore, volunteers and

Reading Partners learn the importance of giving encouragement in training and are taught to be sensitive to the child's reading anxiety. In Shine's Paired Reading sessions, children have a variety of relevant materials and can choose what to read[36]. Like in Shared Reading, conversations engendered by the story encourage children to enjoy the experience rather than see it as simply a lesson in decoding skills.

5.7 Teaching and learning approaches

The context within which a child learns to read has been found to be very important for positive outcomes, with a safe and supportive learning environment being critical. Children need to feel unafraid to make mistakes and be rewarded for their effort and progress. Any anxiety or nervousness around reading will result in less engagement with the task (Coventry University, 2016). Praise, encouragement, and feedback have been shown to be highly motivating for young learners (Gambrell, 2011). Individual attention during one-to-one or one-to-few[37] instruction has also been shown to be far more effective than larger group settings (Education Endowment Foundation, 2016; Slavin et al., 2011).

Shine endeavours to create just this environment for learners in their programmes. Volunteers and Reading Partners are trained to create a warm, supportive, and fun learning environment which removes academic pressure and replaces it with encouragement and enjoyment. Volunteers and Reading Partners are taught to praise and not to criticise. Volunteers and Reading Partners support the same learners over time, allowing them to build trust and help the child see their own progress. With Y4L, learners visit the Reading Corner one at a time and receive completely individualised attention.

5.8 Modelling and Interaction

Evidence suggests that the benefits seen from Shared Reading and Paired Reading are largely due to the extended conversations which take place during and after the activity around the text (Lonigan, 2008; National Early Literacy Panel, 2008; Vally 2012). These rich conversations support oral language development and reading comprehension (Pelletier, 2011). They also make reading a social and more meaningful experience, which promotes enjoyment and motivation (Bloch, 2005; Gambrell, 2011). For learners who may not have seen reading modelled as

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[36] Out of a range of options selected by the Reading Partner.

[37] Grigg et al. (2016) find that one-to-three instruction is as impactful as one-on-one.

a leisure activity in the home, interaction with adults around stories can provide access to reading role models (Cremin et al., 2009). During the conversations around the story read, the adult imparts their own enthusiasm around reading to the child (Cremin et al., 2009), and begins to blur the boundaries between learning and recreation (Cremin et al., 2009).

Whether in the Shine classroom for SLH or in the Reading Corner under Y4L, Shine activities are a period of rich interaction and model building. Children are encouraged and empowered to ask questions, share their ideas, and respond to the story and to the storyteller. This facilitates real engagement with the text as well as the volunteer or Reading Partner. Volunteers and Reading Partners are trained as to the vital importance of the conversation around the story, as well as to the importance of displaying their own enthusiasm for the activity.

5.9 Programme exposure

Evidence suggests that reading tutoring programmes such as SLH and Y4L are only effective under sufficient programme exposure (Elbaum, 2000; Wasik, 1998). Programmes need to provide reading support for between one and a half and two hours per week. SLH, which provides one-hour sessions twice per week, meets this requirement. In Y4L, Shared Reading is delivered to the whole class simultaneously. It's difficult to determine what this would mean for necessary exposure to Paired Reading, however, if the Reading Partner could see each child for an hour per week[38] in addition to the Shared Reading exposure that would suggest sufficient reading support. This is definitely possible, even in large class sizes, given that one-to-three (one adult to three children) Paired Reading has been seen to be as effective as one-to-one (Grigg et al., 2016). Currently, Y4L uses a one-to-one model. Assessing actual exposure to the programme under this model could help to determine whether Y4L should move to a one-to-two or one-to-three model instead, to ensure all children receive the necessary dose of support.

6. Discussion

This report explored whether we could quantify the impact of Shine's Y4L sub-programme. Let us review what we have learnt.

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[38] Suggestion is based on the observed effectiveness of Help2Read which provides 30-min of exposure twice weekly.

- **The components of Shine's Y4L were fairly similar to their other programmes, SLH and Khanyisa:** By reviewing Shine's programmes we saw that Y4L shared some components of SLH (the Shared and Paired Reading activities and the books being donated). Y4L was very similar to Khanyisa.
- **SLH was robustly evaluated and showed positive impact, but Y4L differed to SLH in meaningful ways:** The impact of SLH was measured in different years by different analysts both quantitatively (the results showed significant positive effects on learner outcomes using WELA) and qualitatively (teachers, parents and principals all saw value in the programme). However, the SLH evaluations did not disaggregate the impact by subcomponent so could not quantify the impact of the Y4L components (the Shared and Paired Reading or the donated books). Also, SLH was implemented by unpaid volunteers (typically well educated, with some work experience, children of their own and reported by Shine to be highly motivated) whilst Y4L was implemented by Reading Partners (these were unemployed matriculants paid minimum wage). We were therefore unclear whether the two models would deliver the same results.
- **Khanyisa showed positive results but the fact that these were from a qualitative survey limited their reliability:** The impact of Khanyisa was not quantitatively measured using learner outcomes, however the qualitative findings from the Reading Partner Journals were informative (they highlighted the importance of books, reflected that children's reading pleasure increased, learners had more reading opportunities in the programme, and that teachers saw the benefit in Khanyisa). Given how similar Y4L was to Khanyisa, these findings were likely to be true for Y4L too.
- **The Y4L was not uniformly implemented making it difficult to evaluate:** Y4L struggled to retain the Reading Partners and the Teacher Assistant model was introduced during the year. This meant children had different experiences in the programme making it difficult to evaluate.
- **The Y4L EGRA data were not suitable for analysis but the qualitative survey showed mostly positive results:** The EGRA data administered by teachers and shared with Shine were unsuitable to evaluate impact because many schools and learners were missing data and it was not clear the EGRA were administered uniformly by the various teachers. However, in the absence of quantitative assessment data, qualitative survey data of Reading Partners indicated a mostly positive programme experience and observations of learners' outcomes.

- **Robust evaluations of programmes that shared some of Y4L's components showed mixed results:** Literacy programmes which shared features with Y4L (like Shared or Paired Reading and book donations) and had external impact reports available (such as Room to Read and Funda Wande's Teacher Assistant programme) showed positive learner literacy outcomes. This was encouraging however we were unable to pinpoint the effect of the Shared or Paired Reading and book donations versus the other activities of these programmes. However, other programmes such as Story Powered Schools did not find an impact which highlighted that programme fidelity and exposure were important.
- **Programmes which were very similar to Y4L suggested positive impact and Shine should try access to these evaluations to learn more:** Amongst programmes very similar to Y4L (namely Wordworks' Ready Steady Read Write and Help2Read) there was evidence of effectiveness in both instances. This was particularly useful in the case of Help2Read, where unemployed youth were hired as reading supports (similar to Y4L). We recommend Shine reach out to these programmes to learn more about the evaluations.
- **The components of Y4L are all supported by strong research:** There is strong global research underpinning the design of the Y4L programme.

There were however some questions that were unanswered by existing evaluations:

- Was the programme being **implemented as Shine designed it**? For instance:
  - Was the **training effective** in equipping the Reading Partners with the skills required?
  - Were the **Reading Partners conducting the activities they should** with the children?
  - Were **Reading Partners retained long enough** to practise and improve their skills and develop trusting relationships with the children?
- Did Shine make accurate assumptions about the **external environment**?
  - Are the **teachers and principals supportive** of the programme - allowing the Reading Partners to conduct their Shine activities? Do the teachers find the programme useful?
  - Is the **environment in the classroom suitable** for the Shine programme (quiet enough for children to read in the reading corner, protected from the outside elements such as rain, safe etc)?

- What are **Shine's goals** and what does this mean for its **role in the broader education sector**?
  - Is the programme delivering **value for money**? What are the implementing costs of Y4L and how do these compare to those of other programmes (and their impact)?
  - How does the programme fit within the **current South African context**?

7. **Summary and** recommendations

Our first recommendations relate to **Shine's conceptual M&E tools**. We recommend Shine do a **TOC workshop** to update its TOC and compile an **indicator matrix** that matches indicators to relevant elements of the TOC. This should help future decision-making around programme choice and evaluation design. For example, the indicator matrix would be very useful in designing the classroom observation, as it would guide the researcher on what behaviours and activities to look for.

There are a number of ways to improve the TOC:
1. Be more definitive, avoiding comparative adjectives like "increase" or "more". For instance, it is not clear from the impact statement what scale Shine wants to achieve.
2. Ensure the outputs and outcomes are not mistakenly worded as activities.
3. Ensure all activities are covered including support activities like M&E or fundraising.

The indicator matrix systematically links the TOC to SMART indicators (Specific, Measurable, Achievable, Relevant and Timebound), ensuring relevant aspects are measured. It also highlights how existing data should be used and where data needs to be collected. Ultimately it reveals what is working and why in a systematic way. This is a useful conceptual tool every non-profit should have.

The review of the existing data and evaluations highlighted the importance of a few evaluations for Shine and we **recommend Shine reach out to these organisations (e.g. Help to Read) to learn more**.

Next, the unanswered questions above suggest an **implementation evaluation** is needed to see if the programme is being implemented as designed and whether the environment is interacting in the way that was expected. Some implementation questions were answered in the Khanyisa qualitative survey and Y4L and Khanyisa were sufficiently similar that we can use this information to inform us about Y4L. However, there were some aspects that required further

exploration. To answer these questions, we outline approaches below to evaluate the adapted Y4L model that is currently being run in 2023 which relies solely on Teacher Assistants.

The main gaps in our understanding of implementation include:

- To what extent are the Teacher Assistant doing the activities outlined in the Hickman (2018) report?
- How much time on average the Teacher Assistants spend on Shared and Paired Reading each week?
- Are all learners receiving support and how do the Teacher Assistants divide support by learners?
- What is the quality of the Teacher Assistant relationship with teachers? What do teachers think about the programme?
- Have the issues raised by the Khanyisa survey been addressed (e.g. do Teaching Assistants feel better equipped to deal with issues of classroom discipline)?
- How likely are Teacher Assistants to quit?

This information could be gathered through various means. The first is **classroom observations** in a sample of schools representative of all Shine schools (ideally over an extensive period such as every day for a week or more to avoid Teaching Assistants performing for the observer). The second is **short interviews or focus groups** with the Teacher Assistants and/or teachers. The third is a **survey** with all Teaching Assistants where they self reflect on the above. The results from the three data types could be compared to see if they provide reliable information. This information can be used to inform how effectively the programme is being implemented. It would illuminate whether the Teacher Assistant model is effective or how this could be improved. Similarly it might show the model should be abandoned and Shine could refocus on one of their alternative programmes.

Next Shine must **consider its role in the South African education sector** to decide what evaluations and research to pursue.

- **What scale does Shine envisage**? If Shine would like to scale considerably then achieving strong teacher support is critical given the current education political context. Understanding teachers' views of the programme is critical for this therefore and the teacher focus groups and surveys described above should take this into account. Furthermore, it will be important to compare the cost of the programme to other education programmes of which the costs are publicly available to try and estimate the relative costs and benefits. This could partly be done through desk research and partly

through interviews (with relevant Shine staff and the staff of other programmes willing to share this information).

- What does **Shine want to contribute to existing research on programme efficacy?** In 2022 there were an estimated 250, 000 Education Assistants and General School Assistants in South Africa making them a critical lever for change in the education system. Research supporting how to make Teacher Assistants more effective is therefore important and timely for South Africa. If Shine would like to contribute to this body of knowledge a robust impact evaluation of the programme may be recommended (various options discussed below). In addition, the decision by the WCED to get teachers to collect EGRA could present useful data that could be used in various evaluations and research. It would be valuable to have information on how reliable these data are and how they can be improved. If Shine chooses an evaluation that uses the WCED EGRA this goal could be achieved (see more below).
- **A comparison of the quantitative evaluation approaches:**
  - **Randomized Control Trial (RCT):** A quantitative impact evaluation employing an RCT design is considered the 'gold standard' in M&E. The basis of an RCT is random assignment of participants to groups. Random assignment is an important tool for evaluations as, at large enough sample sizes, it ensures equivalence between the project and control group on important observable and unobservable characteristics that may influence assessed outcomes. In this way, the causal impact of a programme can be determined, ensuring confounding factors such as learner ability and school effectiveness are controlled for.
  - The benefits to an RCT would be that Shine could more accurately quantify the impact of Y4L (and if designed correctly, quantify the impact of the different components of Y4L). This could drive internal decisions within Shine on what activities to prioritise or how to adapt Y4L and even whether to adapt other programmes such as SLH. The RCT results could also be used to secure future funding (if Y4L was impactful). Finally, the results from the RCT could be useful for other programmes intending to work with teacher assistants.
  - Conducting an RCT for Shine would be difficult however both in terms of implementation and cost. In an RCT, treatment and control schools need to be randomly selected. As Shine are already working in many schools this would mean selecting new schools which would delay data collection and may not be Shine's implementation

intention. In addition, RCTs cost more than other evaluations. An RCT for Y4L may cost more than R1 million.[39] This is because RCTs need large sample sizes (about 40 schools) and data collection must be outsourced (to ensure it is objective and standardised).

- ○ **Quasi-experimental:** Similar to an RCT, quasi-experiments aim to demonstrate causality between an intervention and an outcome. To do this, quasi-experimental methods need to be designed in such a way as to mimic the same outcome without the benefit of randomisation. Quasi-experiments take on a number of forms, but the most relevant for Shine would be a matched-control design. As the name suggests, in this design the control group is matched to the treatment group on observable background characteristics, such as location, fee or no-fee structure, or ratio of teachers to learners. Whilst similarity in observable characteristics do not guarantee similarity in unobservables (such as teacher or principal motivation) the hope is that with a large enough sample these would even out. This design would allow Shine to use the schools they already work within in their sample thus not requiring a shift in implementation model.
- ○ While quasi-experimental methods are often as expensive as an RCT - since they involve similar activities - one could reduce costs by accessing WCED EGRA data (for Shine and control schools). This would lower costs substantially. However, as we discussed before, these data have serious quality issues. A first step may be to commission an investigation of the quality of the WCED's EGRA data, assuming access to it would be possible. One could also try to access WELA results from non-Shine schools if they are willing to share these.
- ○ Another way to evaluate Shine with a quasi-experimental design would be to use absenteeism of learners or Teaching Assistants to see whether learners with higher programme hours did better (using either the EGRA or WELA). This may suffer from selection bias (learners or Teaching Assistants that are consistently absent may differ from others for reasons beyond participation in the programme). However combining the results with other data sources could help to account for this. One issue with this approach is that selection into a reading session with a Reading Partner is

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[39] This figure is taken from personal experience supporting interventions running RCTs.

correlated with ability (e.g. learners are brought to the Reading Corner more often if they are seen to be struggling), Shine would have to institute strict protocols around who is supported when, and this would be difficult to monitor and would affect the implementation model.[40] In addition, getting accurate data on reading sessions with individual learners would be difficult in itself.

- In sum, none of the quasi-experimental methods available to Shine are ideal. The best option of those discussed above would be to commission an assessment of the WCED EGRA data and then, if deemed to be reliable and valid, conduct a desktop-based matched control study.

- **Quantitative descriptive evaluation:** this involves collecting data on learner outcomes (i.e. a literacy assessment) without attempting to show causality. For example, the SLH WELA data 2015-2019 (and previously) provide quantitative descriptive results by looking at the change in WELA scores before SLH and after 6 months of implementation but without any control group. Shine could collect WELA data at the end of Grade 1 and mid-Grade 2 (similar to what was done for SLH), compare the results between these time-points, and then compare how the change in results looks relative to what we saw for SLH. As Shine has a network of trained volunteers who collected WELA for their SLH programme these could be used to collect future WELA at relatively low cost.

In summary, there is a lot we can learn from existing research undertaken by Shine and others that suggest what impact Y4L has had. As Shine looks ahead it will be important to update their M&E tools and conduct an implementation evaluation of the newly adapted Y4L in 2023. Thereafter, time spent clarifying their role in the South African education sector will be valuable and only then consider doing an impact evaluation of the programme rather than rushing into this without full knowledge. To borrow from the philosopher Confucius, "Real knowledge is to know the extent of one's ignorance". We hope this report has highlighted what we know already and where the gaps are.

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[40] A baseline WELA assessment would allow Shine to control for ability level. However, because it is known that learners who are initially ahead also improve at greater speeds, just controlling for ability level could still result in a biased outcome estimate that may underestimate the true effect of the programme.

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