

Business Plan

Library Practice for Young Learners

Phase Two: April 2000 - December 2001

A project of
Bibliotek I Samhälle
and
Education Policy Unit (Natal)

With participation of
National Centre for Educational Technology and Distance Education, Department of Education
and
Nine Provincial Departments of Education

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Background

Between 1997-99 a first Phase of the Library Practice for Young Learners project was conducted in all nine provinces of South Africa. Three developments profoundly influenced the conceptual design of the project and its unique response to the need for school library development in South Africa.

1. National policy framework for school library standards

The new government's *National policy framework for school library standards*, formulated in 1996, recognised several factors:

- Diversity of school contexts and communities in South Africa
- Enormous backlogs in the provision of school libraries
- Conceptual schisms between media advisors, school librarians, educators, education managers and senior education managers that affect the way each agency regards, values and engages with the other within the education endeavour had led to the marginalisation of school librarians and threatened the retention of school libraries on general education and training agendas
- Potential of the recently formulated OBE curriculum to return school librarians and library collections to the centre of the teaching and learning activity in schools

The *Policy framework's* most significant contribution to thinking about school libraries includes:

- A reconceptualisation of the notion of a school library that offers a menu of diverse library models for application according to the capacity of the local school community
- A shift in focus away from the institution of the school library (with its systems of circulation, cataloguing and classifying) to a collection of materials used in teaching and learning processes
- A curricular rationale for a collection of library-based learning materials in each school
- School based strategies and plans to progress developmentally from one library model to another
- Based on provisions in the South African Schools Act of 1996, to harness the power of the school governing body to establish a library committee as one of its sub-structures
- Democratic processes of consultation and decision-making with the various constituencies of the school community

2. Human resource development

Appreciating that liberation and democratisation of South Africa also returned the country to the international arena and brought it under the influence of globalisation, the government prioritised the development of individuals and communities. Policy developers in government interpreted globalisation as an imperative that required South Africans to be more skilled, competitive and responsive to new technologies, markets and challenges. Thus, the policies emerging in the education and training/labour sectors shifted the conceptual weight of development from building infrastructure (although this received attention) to developing people and building their capacity.

3. Education spending

There was growing realisation throughout the country that resources for education were insufficient and for non-personnel expenditure the purse would decrease instead of increase for several years. In the first place the backlogs in education, as a result of the decades of neglect under the Apartheid regime, accounted for this shortage. However a second development quickly brought the shortage to a crisis. Equalisation of educator salaries across all races was implemented. This was a principled moral imperative of the new government in South Africa, however it yielded a situation in which personnel expenditure spiralled out of control, in some cases exceeding 95 percent of provincial education budgets.

Within the context of these three influential developments and in response to them, the Library practice for Young Learners project sought to:

- Enable national and provincial senior managers with a school library portfolio to share a common vision and conceptual understanding based on the *Policy Framework*
- Assist in operationalising the *Policy Framework* at provincial level
- Concentrate on developing the capacity of school librarians and media advisors to practice and cope with a context of limited resources.

Phase Two 2000-2001

Conceptual Foundation of Phase Two

The following principles provide the foundation for the design of Phase Two.

Continuity: There must be some level of continuity between the first and second phase of the project in that the second phase should complement the first phase.

Quality and Depth: In the first phase only nine schools, one per province, out of over 27,000 schools in South Africa, participated in the project. Although it is recognised that this intervention is limited in scale, the high impact among the nine project schools is positively impressive and should be further consolidated with piloting of the school library model negotiated and planned by each school governing body, management team and media advisor. On these grounds, the second phase will continue to include the initial nine schools in order to consolidate the quality and depth of intervention and ensure long term sustainability.

Extension not repetition: Phase two should be infused with new ideas and objectives that extend the project beyond the objectives and outcomes of phase one. Above all phase two should not be merely repetitive of phase one.

Development not dependency: The hallmark and priority of the first phase, namely the development of human resources and not physical/material resources as the best way to improve library practice, should be retained. This is because the context and rationale that informed that priority and yielded the design of the first phase has not changed significantly. This does not, however, exclude the possibility of material resources being offered and provided to the nine project schools by other agencies and partners. Indeed, planning for and managing a small grant is built into this second phase.

Reflexivity: The second phase should include activities that are deeply reflexive and not focus only on implementation (as is the wont of participants evidenced in their responses to the questionnaire). Reflexivity will promote an accumulation of intellectual understanding and insight enabling the project to contribute to the construction of knowledge relating to the domain of information studies within South Africa and abroad. This is important for future programmes of government (at all levels) and for those involved in research and the development of future practitioners.

Coherence: Several developmental interventions to address the publicly recognised dysfunction and crisis in the education system are now underway. These are mostly initiatives of the national Department of Education with the full collaboration and participation of provincial departments of education. Many of these interventions centre on district development as the administrative level closest to schools. Phase two should be designed to link up with these interventions and share some features in common with district development strategies.

Interdisciplinary co-operation: Although this project focuses on school libraries, where possible complementarity with other disciplines such as information communications technologies, is desirable.

Start-up

Business Plan drafting

EPU, BIS, and the Reference Group develop the **second** draft of the business plan by end of April and circulate the plan to their constituencies for comment. On receipt of comments (15 May), EPU and BIS produce the **third** draft of the business plan and submit this to Sida (22-29 May).

Appointment of project manager

EPU assigns someone to be the temporary project manager for the next three months (April-June). In that period he/she assists in the development of the business plan, convenes the first reference group meeting, visits provinces, submits nine situational analysis reports and a project progress report to the EPU for circulation to BIS and the reference group.

Reference Group Meeting

Project manager convenes the first Reference Group meeting before the end of April, attended by BIS Working Group members from Sweden. The purpose of the meeting will be to finalise agreement on the business plan, arrange for the final edit and presentation to Sida.

The South African Reference Group will comprise eight members:

1. School library - national level (2): June Matlala, Busi Ndawo
2. School library - provincial level: Lyne Metcalf
3. School/public library - district level: Pat Magwaza
4. School/public library – practitioner level: Mrs Nomvuko Nomnga
5. Former LIWO Working Group: Johnny Jacobs
6. EPU executive director (representing the SA partner)
7. Project manager

Provincial field visits

Project manager visits project schools and gathers data on the current status and situation and to identify support needs.

Project manager meets media advisor to hear his/her perspective on the current status and support needs at the project school and for the media advisor.

Project manager meets provincial head of school libraries to hear his/her perspective on the support needs of the media advisor and the provincial head.

Project manager writes up a situational analysis report about each school and the support needs of the school, media advisor and provincial head.

Budget

Item	Unit cost	Total cost
<i>Project management (April - June)</i>		
Project manager, support staff, logistics, office, equipment, stationery, communications, etc.	20,000	60,000
<i>Reference Group Meeting (17-18 April)</i>		
Flights (domestic)		
Flights (international & domestic) (booked and paid in Sweden)	4 x 2,000	8,000
Hotel accommodation & meals	7 x 2 days x R600	8,400
BIS additional hotel & meals	3 x 5 days x R400	6,000
Car hire	8 days x R400	3,200
<i>Provincial field visits (May - June)</i>		
Flights	5 x 2,000	10,000
Hotel accommodation & meals	20 days x R600	12,000
Car hire	20 days x R400	8,000
		Sub-total 115,600
Contingency (2.5%)		2,890
Audit (2.5%)		<u>2,890</u>
		TOTAL 121,380

Strategic Objectives

Six strategic objectives are to be pursued during Phase Two, with some broken into sub-objectives. There are 23 outcomes and performance indicators and outputs are boldfaced.

There is indirect complementarity between this project and the Minister of Education's Implementation Plan for Tirisano. The Minister's Plan for Tirisano is a strategic plan of implementing the nine priorities that he outlined in his statement *Call to Action: Mobilising citizens to build a South African education and training system for the 21st century*. The Plan is organised into five core programmes, and some relate to providing access to information and library-based resources. Below we cite the most relevant programmes.

- Programme 1: HIV/AIDS.

Project 2: HIV/AIDS within the curriculum. Information materials available in education and training institutions. The distribution of learning and teaching materials on sexuality and HIV/AIDS. Materials for primary schools.

- Programme 2: School effectiveness and Educator professionalism. Ensuring the success of active learning through outcomes-based education.

Project 4: Status and quality of teaching. Outcome: skilled and motivated educators with a sound knowledge base of their subjects/learning areas and the ability to employ a variety of teaching methods and strategies to maximise learning in different contexts.

Project 5: Learner achievement. To ensure improved learner performance and attainment. All learners meet national standards, in particular, competence in reading, writing and numeracy skills.

Project 7: School infrastructure. Outcome: all schools meet the minimum physical and infrastructural requirements necessary to establish and support a conducive learning and teaching environment.

- Programme 3: Literacy.

Project 1: National Literacy Campaign: Promotion of a culture of reading. Enhancing the enthusiasm for reading.

Capacity Building and Development

Sub-objective A: To provide longitudinal support and development to

- The nine project schools and
- Relevant line functionaries within provincial departments

so that the project schools continue library development planning that will enable learners to access the curriculum through the effective provision of learning resources. Providing support is especially important because some provincial departments now have no senior managers specifically for school libraries and/or there are too few media advisors to provide support that will ensure the continuation and success of the project in the selected school from phase one. Such provinces should be specifically targeted for support from the project manager.

Outcomes:

1. School governing bodies, school management teams, teachers and teacher-librarian in the project schools receive sufficient regular **support and guidance** from the relevant school library advisor to ensure continued implementation of their library development plans. (The first year of plans was part of the first phase of the project.)
2. The project manager makes **three sets of school visits** to provide support, and monitor and evaluate progress and ensure that plans are pursued. During the visit the project manager gathers **data about the situation in each school and the development process**, for record keeping and benchmarking to be used later in the project evaluation.
3. When the support from the school library advisor falters, the project manager facilitates **problem-solving discussions** between schools and district officers.
4. The teacher-librarian of each school writes **quarterly reports** (5) about implementation of their library development plans and the support and guidance received from the relevant school library advisor.

The following activity steps detail the capacity building and development support given to each project school and the relevant line functionaries (the first four bullets overlap with the start-up stage in April-June 2000):

- Visit project schools (May-June 2000) to collect information for the situational analysis and to discuss level of support required. At this meeting the school principal, chairperson of school governing body and teacher-librarian will sign a commitment form to confirm the school's participation for the duration of Phase Two.
- Meet with school library advisors and secure their participation (support to project school) for the duration of Phase Two.
- Meet with head of school libraries at a SCHELIS meeting and secure their participation where required for the duration of Phase Two.
- Write up situational analysis of current conditions in each school library and activities related to library-based resources (May-June 2000)
- Make two follow-up visits to project schools and school library advisor (February-March and August-September 2001)

Sub-objective B: To develop capacity among the teachers of phase one schools, to plan, manage and use library-based resources within a policy framework.

Outcomes:

1. Each teacher-librarian submits **documentation relating to their local school library policy, plans and budget for library-related development activities and their planned use of a project grant of R5,000** per school to implement these plans.
2. Each teacher-librarian writes **accountability report about expenditure of the project grant of R5,000 and process of implementation** at his/her school.
3. Each district manager/school library advisor writes **assessment report about how the relevant school plan for using the project grant of R5,000 was implemented** successfully or not.

4. Project manager writes one summative report that includes statistical and descriptive data.

Activity steps

- Project manager drafts documents about the project grant of R5,000, access requirements and criteria for the award, etc. and submits these for approval to the Reference Group's first meeting.
- Project manager informs schools and school library advisor about the project grant of R5,000.
- Schools submit the requisite application documents and budgets to the project manager.
- Project manager summarises the school applications in relation to the award criteria and circulates these to the Reference group.
- Reference Group decides on the awards at the second meeting.
- Awards are deposited into school bank accounts.
- Schools implement their plans during three school terms as specified in the application documents.
- Schools submit an expenditure and narrative report.
- District manager/School library advisor submits an assessment report about how the school utilised the grant in relation to their planned implementation.
- Project manager writes a summative report that can inform the final evaluation.

Sub-objective C: To develop partnerships between (relevant) phase one schools and local government and non-government library-related services

Outcome:

1. Schools that receive a negligible level of support from education authorities and where there is a local library service to provide support, have **meetings to develop a partnership with local library-related services that might lead to a formal agreement.**

Activity steps

This objective is contingent on the development of materials (see Materials Development strategy).

- During the project manager's first visit to schools, an assessment will be made of the level of support that the school library advisor is able to give the school.
- The project manager will communicate periodically by whatever means with the school to ascertain if the support from the school library advisor is being sustained at the level indicated during the first visit.
- For those schools where the level of support has dwindled or does not exist, the project manager will plan to remedy the situation during the second visit to schools. Thus the project manager will undertake some investigations of the remedial support that can be obtained locally from a public or non-governmental library service.
- During the second visit to schools, the project manager arranges and facilitates a meeting for the teacher-librarian, principal and librarian of a local library-related service to negotiate an agreement of support. An NCETDE agreement template will be used in this discussion and form the framework of any agreement that is struck.
- The project manager and teacher-librarian write about these meetings and agreements in their regular reports.

Materials Development

Objective: In liaison with NGOs and other role-players, to develop materials that guide school managers, governing bodies and public and school librarians in sharing responsibility for library-based support to teachers and learners as they access the outcomes-based curriculum.

Outcomes:

1. In consultation with SCHELIS, school library advisors and school level stakeholders and role players, **materials** such as school library development planning, management manuals, sample agreements and contracts and advocacy and fund raising materials are developed.

(Note: The project manager facilitates the development of these materials to pre-publication stage only. NCETDE is responsible for taking the materials through the publication and free national distribution stage.)

Activity steps

- Project manager identifies through consultative meetings and other enquiries appropriate paper based materials for development.
- The project manager writes concept proposals for the video and other materials and calls for three quotations for each product.
- The Reference Group accepts/rejects quotations and EPU (Natal) finalises contracts.
- Contracted material developers draft and design documents (texts and graphics) and/or video.
- Drafted materials are tested, edited and re-tested in schools and public libraries.
- Contracted material developers draft and design documents (text and graphics)
- Manuscripts and products are finalised.
- Materials are submitted to NCETDE as public domain materials for mass printing and free distribution within South Africa.

Advocacy

Objective: To advocate in favour of the role and management of library-based resources in the teaching and learning process in the context of schools-based management.

Outcomes:

1. Role players that participated in Phase One of the project **attend and present papers at the international conference for school librarians (IASL)**, reflectively reporting on the project as a strategy to develop and share models of 'best practice' that integrate the development of library-based resources and the curriculum.
2. The project manager will hold **one national seminar and nine school-based workshops** to inform decision-makers and senior managers in project and nearby schools about the important role of library-based resources in the teaching and learning context. Various materials, including those developed in this project, are used and distributed at these events.
3. Decision-makers and managers in project and nearby schools demonstrate **greater understanding of the important role of library-based resources in the teaching and learning context through their positive decisions concerning the curriculum management** of their schools.
4. NCETDE and the project manager compile an **address database** for NCETDE's distribution of materials.
5. Schools can order **free/low cost copies** of the materials from NCETDE.

Activity steps

Some activities in this objective are contingent on the development of materials (see Materials Development strategy).

- Two South African and two Swedish participants from Phase One attend the IASL conference in Malmö, Sweden, as delegates and they present conference papers and posters and participate in panel discussions.
- At the briefing seminar for South African participants, preparing them (May 2001) for the Study Tour in Sweden, there will be a presentation about the developed materials and their application. Every participant will receive copies of the materials.
- During the last visit to project schools the project manager will hold workshops to present the developed materials and promote their application locally.
- Project manager assists NCETDE in the compilation of an address database.
- NCETDE announces the materials on the Internet, in press statements, at conferences, and in other print media addressed to the target audience.

Study Tours

Objective: To exchange ideas and experiences between Swedish (10) and South African (10) practitioners about i) ways of defining and increasing library-related resources for school learners and educators, and ii) strategies for implementing a school library plan, networking and lobbying at a local level.

Outcomes:

1. **Two preparatory seminar weekends** are held in the host country prior to each study tour during which participants describe current practices and gain insight into the problems relating to limited definitions of resources, practising in isolation and/or independently and how these problems might limit and impact on practice. The seminar weekends may include other presentations of an educative nature.
2. **Two study tours** expose participants to alternative and open ways of defining resources and networking for library development at a local level.
3. Following the study tour, participants write **reports** to demonstrate how their practices have changed in relation to the strategic objective.

Activity steps

The two study tours will follow similar processes and activity steps detailed below, although in each country the activity steps will occur at different times.

- The relevant Reference Groups determine the criteria for selecting the South African and Swedish participants.
- The relevant role players, e.g. SCHELIS, select the participants.
- Project managers present the seminar weekend and study tour plans to the Reference Group for approval and finalisation.
- The project managers and project office arrange the logistics for the relevant study tours and liaise with their counterpart abroad and participants.
- The seminar weekends and study tours are conducted.
- Participants find ways to improve their practices in relation to things learnt during their study tour.
- The project manager in consultation with the Reference Group develops a report framework and distributes this to participants.
- Participants reflect in writing on things learnt during their study tour and the follow-up attempts to improve their practices.

Information and Communications Technologies

Objective: To develop understanding about the use and possibilities of Information Communications Technologies (ICT) as a library-based resource for teaching and learning purposes.

Outcome:

1. South Africans attending the South Africa Study Tour Seminar Programme attend an **orientation demonstration** where they are informed about the

nature of ICT and its application in schools, basic hardware, software and support required, the initial skills educators and teacher-librarians need to use ICT in schools, and other local sites where ICT may be available for public use e.g. the NCETDE web site.

Activity steps

- The project manager will specify the Terms of Reference for outsourcing an ICT orientation demonstration.
- The project manager will contract a skilled ICT practitioner to present an orientation demonstration to the teacher-librarians attending the South Africa Study Tour Seminar Programme.
- The contracted ICT practitioner will present and demonstrate the application of ICT for a school context and provide multiple copies of informative notes and pamphlets to all those attending the seminar.
- During the third visit to schools the project manager will assess whether any schools have taken any action as a direct response to what they learnt at the seminar.

Case Studies Research

Objective: To examine and understand the limits and potentialities of the north-south exchange programme for developing media advisors, school library managers and public librarians in South Africa. For example, the development processes, the role of agency and critical incidents that functioned as turning points in the development of participants and their school libraries in the first phase are to be examined.

Outcomes:

1. One hundred copies of report are published comprising in-depth reflective case studies of three schools and identifying the diverse strategies each school pursued in developing the localised library development plans and the reasons for the failures and/or successes in each instance.
2. At least 4 Black and female South African researchers and teacher-librarian practitioners are mentored and have developed their capacity to undertake case study research.

Activity steps

- The project manager, in consultation with EPU (Natal)'s executive director and NCETDE will select three project schools to be case studies. Proximity to EPU as an organisational support base and diversity in library models will be among the selection criteria.
- EPU (Natal) will hold a residential weekend seminar that introduces the interns and participant from each project school or district office, to case study research methodology and considers lessons from previous case studies.
- An experienced researcher will train one novice researcher and three local teacher-librarian/library managers in the techniques of case study research, including instrument development, data gathering, processing and analysis, and report writing.
- The research team will conduct data gathering field visits to the case study schools.
- The research team will collaborate on instrument development, data gathering, processing and analysis, and report writing.
- The project manager will facilitate the publishing of the report.
- The project manager will distribute copies of the report to the relevant role players and stakeholders, key decision-makers and key education research institutions in South Africa and Sweden.

Summary of the Strategic Objectives, Outcome Indicators

Strategies	Strategic objective	Outcome indicators
Capacity building and development	A. Longitudinal support and development	<ol style="list-style-type: none"> 1. School library advisor gives regular support and guidance to schools 2. Three sets of school visits 3. Problem-solving discussions 4. Quarterly reports
	B. Develop teachers capacity to plan, manage and use library-based resources (small grant) within a policy framework	<ul style="list-style-type: none"> • Documentation about school library policy, plans and budget for development activities • Accountability report about expenditure • Assessment report

		<ul style="list-style-type: none"> about implementing project grant plan • Summative report
	C. Partnerships between schools and library-related services	<ul style="list-style-type: none"> • Meetings to develop a partnership with local library-related services that might lead to an agreement
Materials development	Develop materials to guide target group in sharing responsibility for library-based support that enables curriculum access	<ul style="list-style-type: none"> • Materials developed after consultation
Advocacy	Advocate in favour of the role and management of library-based resources in the teaching and learning process	<ul style="list-style-type: none"> • Attend and present papers at IASL conference • One national seminar and nine school-based workshops where materials are used and distributed • Greater understanding of role of library-based resources in teaching and learning through positive decision • Address database • Free/low cost copies of materials
Study tours	Exchange ideas and experiences between Swedish/South African practitioners about library-related resources and strategies for developing library-based resources	<ul style="list-style-type: none"> • Two preparatory seminar weekends • Two study tours • Participant reports
Information technology	Develop understanding about use and possibilities of ICT	<ul style="list-style-type: none"> • Orientation demonstration
Case studies research	Examine and understand the exchange programme (in phase one) as a strategy for developing the target group	<ul style="list-style-type: none"> • One hundred copies of report are published • Black and female South African researchers/practitioners are mentored in research processes

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Implementation

Roles of partners

At a meeting in October 1999 of the Phase One South African partner, the LIWO Working Group, and members of the Department of Education's National Centre for Educational Technology and Distance Education (NCETDE), it was agreed that the Education Policy Unit (Natal) should take on the role as South African partner for the second phase of the project.

As the South African partner, EPU (Natal) liaises with the Swedish partner in terms of reporting and financial matters, and facilitates and manages the project on a day-to-day basis. EPU (Natal) is contractually bound to the Swedish partner to ensure implementation and completion of phase two goals and activities within the agreed time frames.

A Project Reference Group advises EPU (Natal) on the implementation of the project. The reference group includes some members of the Working Group, representatives of NCETDE, representatives of the public library sector and EPU (Natal).

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South Africa				Sweden			
		b	«	EPU (SA partner)	¾	BIS (SE partner)	¾ Sida (Funder)
		b		½		â	
NCETDE	«	Reference Group		Project Manager		Reference Group	
â				â			
SCHLIS		Contracted service providers		â â â â			
á				â			
PEDs Advisors Schools		PEDs Advisors Schools		PEDs Advisors Schools		School	School

Relationships¾ Contractual

- Representational / Accountability

Strategy to secure participation of beneficiaries

- The Director-General of the Department of Education is asked to approve the final business plan and ensure the commitment and participation of NCETDE in Phase Two.
- Members of SCHLIS received and commented on the penultimate draft of the business plan.
- The project manager will make a presentation about Phase Two at the SCHLIS meeting on 17 May 2000.
- Write a letter to Head asking them to meet with the advisor and school library, principal and SGB to signify their commitment to and participation in Phase Two. [Status report and mapping of the project schools will determine which project schools are still in .]
- Any other participants e.g. study tour members, will be asked to signify their commitment to and participation in Phase Two.

Roles of specific role players and participantsBibliotek I Samehalle (BIS)

- Complete drafting of business plan with EPU (Natal)
- Report to and liaise with Sida
- Convene and report to BIS Reference Group
- Ensure delivery on strategic objectives within Sweden
- Develop criteria for the selection of Swedish study tour participants
- Liaise with EPU (Natal)
- Ensure financial management and audit
- Market project internationally
- Evaluate the project in its entirety (i.e. Sweden and South Africa)

Education Policy Unit (Natal)

- Complete drafting of business plan with BIS
- Report to and liaise with BIS
- Convene and report to EPU Reference Group meetings
- Ensure delivery on strategic objectives within South Africa
- Appoint and employ the project manager and other service providers
- Ensure overall financial management and audit of South African activities

- Monitor progress and take corrective action to ensure the continued delivery of activities
- Market project within South Africa

Contracted service providers to EPU (Natal)

1. Project manager

- Run the project office with support from EPU staff
- Manage and organise day-to-day activities to deliver outcomes on strategic objectives
- Communicate with relevant provincial education department (PED) officers
- Develop and maintain database of participants
- Work within the budget
- Report to EPU (Natal)
- Write and submit monthly progress reports to the partners, reference group and SCHELIS
- Organise logistical arrangements for all activities
- Negotiate contracts of service providers and monitor their service delivery and quality
- Monitor progress and take corrective action when problems arise and obstruct activities and outcomes

2. Experts e.g. materials developers, ITC consultants

Reference Groups (in Sweden and South Africa)

- Contribute to drafting of business plan
- Receive progress reports and monitor the project
- Advise relevant partner
- Determine the criteria for selection of South African study tour participants
- Provide information during evaluation
- Intervene in matters affecting the entire project

Department of Education: National Centre for Educational Technology and Distance Education (NCETDE)

- Attend Reference Group meetings
- Negotiate Department of Education's support for the business plan
- Liaise with the project manager
- Receive monthly project reports and distribute these to SCHELIS members
- Liaise with SCHELIS and provincial education department (PED) officers
- Assist project manager in liaising with school communities e.g. for study tour arrangements
- Publish and distribute materials developed by the project
- Collaborate with project manager in developing a database of contacts for distributing materials
- Attend the IASL conference
- Market the project on the Centre's web site

Provincial Education Department (PED) Heads of School Libraries

- Ensure participation of relevant PED officers in project activities
- Ensure that project activities within the province are coherent with national policies and plans
- Receive monthly project reports via SCHELIS
- Advise in the selection of study tour participants
- Facilitate contact with relevant role players in provinces

District/Area managers and school library advisors

- Collaborate with project manager in liaising with and providing support to relevant school communities
- Monitor progress and take corrective action among relevant school communities
- Report on specified activities

School communities

- Commit themselves to participation in the project
- Participate in relevant project activities
- Report to project manager and relevant school library advisor/district manager

Study tour participants

- Engage fully in all study tour activities (before, during and after tour)
- Write report on the actions taken since the trip

Assumptions and Risk Analysis

The design of the project is premised on a number of assumptions and risks. These are noted, together with ways in which the risks will be minimised.

- The role of the South African project manager is vital to the overall success of the project. Care must be taken to secure an experienced and reliable person. Advertisements are being placed in weekend newspapers that have a suitable readership and the selection process will be rigorous, where possible by requiring demonstration of the requisite skills. If no suitable applications are received, the selection strategy will be assessed and a second round of advertisements may be published.
- Some activities require expertise that the project manager may not have. It is therefore assumed that external service providers with expertise in specific fields such as materials development will be available and can be contracted to the project. South Africa has a large community of such service providers so availability of these experts is not regarded as a risk unless the project manager fails to secure their services well in advance.
- Experience from Phase 1 of this project is that there is a moderate risk of attrition among the participants. For example, some of the PED officers and teacher-librarians may have resigned or been re-deployed to other schools and/or districts. Attrition may also occur in relation to predictions that South Africa is entering the period in which there will be widespread presentation of full-blown AIDS in the infected population. The extent to which project participants are 'at risk' is not known. It is not possible for the partners to control the attrition risk.
- Although the South African economy is internally robust and inflation is in single digits, the Rand currency has shown itself to be vulnerable to political developments within the sub-continent and shifts in global markets. Such things are beyond the control of the partners and may impact on expenditure for items such as international flights and local travel. A 2.5% contingency on total expenditure is set aside to offset unforeseen increases.
- It is noted that developments within the South African education system may have an effect on the project. For example, there may be national labour strikes called by the educator and public service unions. Also, the Committee that is reviewing the implementation of Curriculum 2005 will report shortly to the Minister. It is the view of the South African partner, EPU (Natal), that radical shifts in education policy and extended periods of labour strikes are not anticipated. Therefore these developments are not assessed as posing a serious threat to the project.
- A lot of effort is being made to improve the physical infrastructure and information communications technology capacity of public schools in South Africa. Nevertheless, it is recognised that some schools involved in this project may not yet be electrified, have phones or capacity to use information communications technology. Furthermore, there may be very little support capacity from district officers and in the local business community. Thus, the risk of initiating an ambitious undertaking in schools without guaranteed support conditions, has been minimised but limiting the relevant strategic objective to a modest outcome.
- During phase 1 the then South African partner, LIWO, became dormant and defunct, and procedures are underway to close the organisation. A risk of the same happening with the new South African partner, EPU (Natal), is negligible because the organisation is financially sound and has contracts at least to the end of 2001.

Monitoring and Evaluation

- BIS and EPU (Natal) are responsible for monitoring the project in their respective countries, with BIS responsible for the overall evaluation of activities in both countries.
- EPU (Natal) will issue monthly electronic reports to BIS and the EPU Reference Group.
- The Reference Group will meet at least three times to monitor progress and advise on the direction of project activities. As necessary, teleconferences will be held.
- Each strategic objective and activity has reporting requirements and/or performance indicators that will be used by the Reference Groups and partners to monitor the project.
- BIS will contract an evaluator to conduct a final evaluation of activities in South Africa and Sweden. BIS and EPU (Natal) will develop Terms of Reference.
- Final audit of the financial accounts will be arranged and co-ordinated by BIS and EPU (Natal).

Budget: July 2000 – December 2001 (18 months)

Item	Unit costs	Total cost in ZAR
MANAGEMENT		R 488,200
Project management		440,000
South Africa: Project manager, support staff, logistics, office, equipment, stationery, communications, etc.	20,000/month x 18	360,000
Sweden: Project manager, support staff, stationery, communications, etc	R1,000/day x 30	30,000
Marketing through BIS journal issues		20,000
Evaluation		30,000

Reference Group (SA)		38,200
Meetings (3)		
Flights (domestic)	1,800 x 6 x 3	32,400
Local travel	500 x 3	1,500
Catering	500 x 3	1,500
Materials	100 x 3	300
Teleconferences (5)	500 x 5	2,500
Reference Group (SE)		10,000
Meetings (4)	2,500 x 4	10,000
Strategic Objectives		R
		675,550
Capacity Building		136,800
Provincial field visits (3)		91,800
Flights	3 x 8 x 1,800	43,200

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Hotel accom & meals 3 x 18 days x R500 27.000Travel/Car hire 3 x 18 days x R400 21.600Award grants 5.000 45.000**Materials development 55,000**Consultation with SCHELIS and other stakeholders, etc 5.000Print materials production 50.000**Advocacy 15,000**IASL conference in Malmö, Sweden 15.000Accommodation 10.000Travel 5.000Seminar 0Address database 0Free/low cost materials through NCETDE 0**Study Tours 371,250****i) Study Tour in South Africa 209,350**Preparatory weekend seminar in SE (15 people) 23.450Travel 610 x 15 9.150Accom & meals 500 x 15 7.500Lecturer 3.800Materials 200 x 15 3.000Pre-tour weekend seminar (11+10+2 people) 51.700Flights 13 x R1.800 23.400Accom 23 x 2 days x R500 23.000Travel/Car hire 3 days x R1.000 3.000Materials R100 x 23 2.300Study tour (10+1 people) 134,200International flights R7.500 x 10 75.000Domestic flights R5.000 x 1 5.000

Accom & meals 8 x R500 x 11 44.000

Travel/car hire 8 x R1.000 8.000

Materials R200 x 11 2.200

ii) Study Tour in Sweden 161,500

Preparatory weekend seminar in SA (10 + 2 people) 30.000

Travel R1.800 x 12 21.600

Accom & meals 1 day x R500 x 12 6.000

Materials R200 x 12 2.400

Study tour 131.500

International flights R6.000 x 10 60.000

Domestic travel 7.500

Accom. meals & per diem 8 x R500 x 10 40.000

Materials R200 x 10 2.000

Final seminar 2 days x R500 x 22 22.000

Information and Communications Technologies 3,500

Consultant 2.000

Accommodation/flight/car hire 1.500

Case studies (3) 94,400

Introductory methodology workshop with research team R13.600

(3+2+2 people)

Flights 3 x R1.800 5.400

Car hire 2 days x R400 800

Accom & meals 2 days x R500 x 7 7.000

Materials 400

Field work 31.800

Flights 2 x R1.800 x 3 10.800

Car hire 5 x R400 x 3 6.000

Accom & meals 2 x 5 days x R500 x 3 15.000

Research interns 2 x R5.000 x 3 months 30.000

Instruments & materials R1.000 x 3 3.000

Report printing and binding 15.000

Distribution of reports 1.000

Summary of Budget

Management 488.200

Strategic Objectives 675.550

Sub-total R 1,163,750

Contingency (2.5%) 29.000

Audit (2.5%) 29.000

TOTAL R 1,221,750

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Time Frames**2000**

Strategies				April	May	June
Management				<ul style="list-style-type: none"> Ref Gp Mtg launch Draft BizPlan to SCHELIS, EPU, NCETDE, BIS 	<ul style="list-style-type: none"> Finalise and submit BizPlan School visit (status report) Appoint Project Manager SCHELIS mtg presentation 	<ul style="list-style-type: none"> Status Report Ref Gp Mtg (1)
1. Capacity building & development					<ul style="list-style-type: none"> Schools sign into project 	<ul style="list-style-type: none"> Determine Award criteria
1. Information communications technology						
1. Advocacy						
1. Materials development						
1. Case studies						
1. Study tour exchange						<ul style="list-style-type: none"> Determine criteria for SE participants

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2000

Strategies	July	August	September	October	November	December
Management		<ul style="list-style-type: none"> IASL conference in Malmö, Sweden 	<ul style="list-style-type: none"> Ref Gp Mtg (2) 			<ul style="list-style-type: none"> Ref Gp Mtg (3)
1. Capacity building & development		<ul style="list-style-type: none"> School visits (1) Schools submit quarterly report (1) 	<ul style="list-style-type: none"> School visits cont. 	<ul style="list-style-type: none"> Schools submit plans & budgets for award usage 		<ul style="list-style-type: none"> Schools submit quarterly report (2) Awards decided
1. Information communications technology	<ul style="list-style-type: none"> Review existing ICT training materials 	<ul style="list-style-type: none"> Review cont. Review report Contract trainer 	<ul style="list-style-type: none"> Orientation seminar 			
<ul style="list-style-type: none"> Advocacy 						
1. Materials development	<ul style="list-style-type: none"> Consultative Mtgs 	<ul style="list-style-type: none"> Print material concept proposals written and quotations called 	<ul style="list-style-type: none"> Print material quotations scrutinised and contracts awarded by Ref Gp. 	<ul style="list-style-type: none"> Drafting print materials 	<ul style="list-style-type: none"> Drafting print materials 	<ul style="list-style-type: none"> Drafting print materials

1. Case studies						
1. Study tour exchange	<ul style="list-style-type: none"> Plan tour 	<ul style="list-style-type: none"> Plan tour 	<ul style="list-style-type: none"> Plan tour Plan weekend seminar to include ICT orientation, project school presentations and intro to SA school & library system Hold preparatory seminar weekend Conduct study tour in South Africa 	<ul style="list-style-type: none"> Conduct study tour cont. 		<ul style="list-style-type: none"> Determine criteria for selection of SA participants

2001

Strategies	January	February	March	April	May	June
Management				<ul style="list-style-type: none"> Ref Gp Mtg (4) 		
1. Capacity building & development	<ul style="list-style-type: none"> Awards deposited 	<ul style="list-style-type: none"> School visits (2) Schools mtg with public/NGO library 	<ul style="list-style-type: none"> School visits cont. <ul style="list-style-type: none"> Schools mtg with public/NGO library Schools submit quarterly report (3) 			<ul style="list-style-type: none"> Schools submit quarterly report (4)
1. Information communications technology						
1. Advocacy					<ul style="list-style-type: none"> Presentation about using NCETDE materials at preparatory seminar weekend for Study Tour in Sweden 	
1. Materials development	<ul style="list-style-type: none"> Drafting print materials 	<ul style="list-style-type: none"> Test, edit and re-test print materials 	<ul style="list-style-type: none"> Final edit print materials Designed materials to NCETDE for publishing 	<ul style="list-style-type: none"> Develop mail database 		
<ul style="list-style-type: none"> Case studies 	<ul style="list-style-type: none"> Recruit research team Train research team 	<ul style="list-style-type: none"> Conduct case study (1) 	<ul style="list-style-type: none"> Write up case study (1) 	<ul style="list-style-type: none"> Conduct case study (2) 	<ul style="list-style-type: none"> Write up case study (2) Conduct case study (3) 	<ul style="list-style-type: none"> Write up case study (3)
1. Study tour exchange		<ul style="list-style-type: none"> Select SA participants 	<ul style="list-style-type: none"> SE participants submit reports 		<ul style="list-style-type: none"> Hold preparatory seminar weekend for SA participants Conduct study tour in Sweden 	

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2001

Strategies	July	August	September	October	November	December
Management			<ul style="list-style-type: none"> Ref Gp Mtg (5) 	<ul style="list-style-type: none"> Evaluation 	<ul style="list-style-type: none"> Evaluation Final Report 	<ul style="list-style-type: none"> Evaluation Final Report
1. Capacity building & development		<ul style="list-style-type: none"> School visits (3) 	<ul style="list-style-type: none"> School visits cont. Schools submit final report District manager/advisor report re award use 			
1. Information communications technology						
1. Advocacy		<ul style="list-style-type: none"> School workshops about using NCETDE materials 	<ul style="list-style-type: none"> School workshops about using NCETDE materials 			
1. Materials development						
1. Case studies	<ul style="list-style-type: none"> Publish case studies report 					
<ul style="list-style-type: none"> Study tour exchange 			<ul style="list-style-type: none"> SA participants submit reports 			

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