

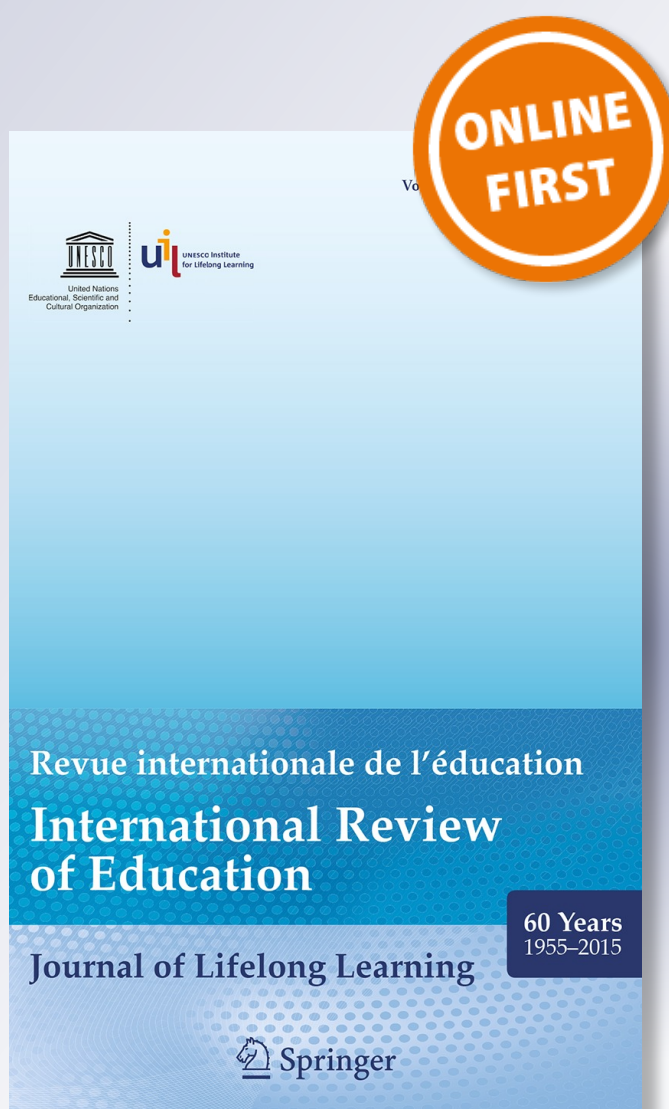
# *Measuring and monitoring in the South African Kha Ri Gude mass literacy campaign*

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**International Review of Education**  
Journal of Lifelong Learning

ISSN 0020-8566

Int Rev Educ  
DOI 10.1007/s11159-015-9495-8



# Measuring and monitoring in the South African *Kha Ri Gude* mass literacy campaign

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**Abstract** After many previous failed attempts to reach illiterate adults, the award-winning South African *Kha Ri Gude* mass literacy campaign, launched in 2008, undertook to ensure that learners seized the opportunity to learn – for many adults, this was a “last chance”. Written from an insider perspective by the campaign’s founding Chief Executive Officer, this article outlines the features which contributed to its success despite the many challenges it initially faced. The author outlines the social and legislative backdrop, notably the South African National Qualifications Framework (NQF) providing the scaffold for the continuum of adult learning and the assessment of learning outcomes, and examines the various components which influenced the design of the campaign. She focuses, in particular, on the learning outcomes measurement model tailored to the campaign’s specific context, namely a structured and standardised learner assessment portfolio (LAP). Designed as a tool to be administered universally for both formative and diagnostic purposes, the portfolio enables continuous assessment, forming an integral part of the process of learning and teaching. After many initial challenges encountered in introducing this mode of learner assessment, it was eventually institutionalised and found to be a non-threatening way of assessing learning outcomes while also functioning as a tool for monitoring and ensuring accountability in the campaign. This article gives an account of the development considerations and explains the role of the assessment process within the broader context of the campaign. It also refers to ways in which the mass-based assessments were administered under difficult campaign conditions with a view to assessing *for* learning.

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**Keywords** Literacy · Lifelong learning · Assessment · Portfolio · Adult learning · Mass campaign · *Kha Ri Gude* · Qualifications framework · Adult education

**Résumé** Mesure et suivi de la campagne d’alphabétisation de masse *Kha Ri Gude* en Afrique du Sud – Après de nombreuses tentatives manquées de desservir les adultes illettrés, la campagne d’alphabétisation de masse sud-africaine *Kha Ri Gude*, lancée en 2008 et récompensée par un prix, s’est assurée que les citoyens saisissent l’opportunité d’apprendre – elle était une « dernière chance » pour un grand nombre d’adultes. Rédigé dans une perspective interne par la directrice générale fondatrice de la campagne, l’article présente les caractéristiques qui ont contribué à son succès malgré les nombreux défis rencontrés au début. L’auteure expose le contexte social et législatif, notamment le cadre national sud-africain de qualification (CNQ), qui fournit une charpente pour le processus continu d’apprentissage des adultes et pour l’évaluation des acquis, et spécifie les diverses composantes qui ont influencé la conception de la campagne. Elle s’attarde en particulier sur le modèle de mesure des acquis ajusté au contexte spécifique de cette campagne, à savoir un portefeuille structuré et standardisé d’évaluation de l’apprenant. Conçu comme instrument de gestion universelle à des fins, tant de formation que d’évaluation, ce portefeuille permet une évaluation permanente et fait partie intégrante du processus d’apprentissage et d’enseignement. Malgré de nombreuses difficultés initiales pour l’introduire, ce type d’évaluation de l’apprenant a été finalement institutionnalisé et s’est avéré être un moyen d’évaluer les acquis sans pression, tout en servant d’instrument de suivi et de responsabilisation durant la campagne. L’auteure rend compte des considérations lors de la conception et explique le rôle du processus d’évaluation dans le contexte général de la campagne. Elle mentionne également comment les évaluations de masse ont été gérées dans des conditions difficiles de campagne avec l’objectif d’évaluer *en faveur de* l’apprentissage.

## To campaign or not to campaign?

Twelve years after South Africa’s first democratic election in 1994, the country was faced with the decision whether or not to embark on a literacy campaign, because the existing national system of Adult Basic Education and Training (ABET)<sup>1</sup> had not made any impact on reducing the number of adult illiterates. In response to this dilemma, Naledi Pandor, who was Minister of Education at the time, established a Ministerial Committee on Literacy (MCL) in February 2006 to develop a strategic plan for a mass literacy campaign in South Africa. The committee spent two years researching and preparing what eventually became the South African *Kha Ri Gude*<sup>2</sup> National Literacy Campaign.

<sup>1</sup> The South African national system of Adult Basic Education and Training (ABET) was established shortly after the first South African Democratic elections in 1994, with the introduction of the “National adult basic education and training framework: Interim guidelines” in September 1995. Subsequently, the Adult Basic Education and Training Act was promulgated in 2000.

<sup>2</sup> *Kha Ri Gude* (pronounced [car-ri-goody]) is Tshivenda for “Let us learn”. The decision to use Tshivenda terminology reflects the purpose of accentuating the minority status of the language.

The decision to launch a campaign in South Africa was taken amid international and local debates on the successes and failures of campaigns elsewhere in the world. In addition, as part of its preparation, the MCL had taken into account a number of models for campaigning for literacy – in particular an earlier national campaign, the South African National Literacy Initiative,<sup>3</sup> which was considered as a home-grown and tested model. Other models contemplated by the MCL included the Cuban literacy campaign *Yo, sí puedo*, as implemented in Venezuela, the *Alfabetização Solidária* (AlfaSol) of Brazil and the National Literacy Mission in India. The MCL also undertook study visits to Cuba, Venezuela and New Zealand to explore the operations of further campaigns, which inspired its decision to embark on a literacy campaign for South Africa. In the words of Dr Casius Lubisi, leader of the MCL:

Our belief in what could be achieved in our country was strengthened by what we witnessed in Cuba and Venezuela and [New Zealand] ... as we climbed up the mountains of Guarenas to the *barrios* of Venezuela, as we interacted with Cuban advisors in Caracas, as we sang and shared ideas with the Maori in New Zealand, we were left with nothing but a sense of hope for our people ... We came back revitalised and ready to make a contribution to pushing back the frontiers of poverty, despair and indignity – for illiteracy is indeed an affront to human dignity (DoE 2006, Foreword).

The South African Cabinet approved the proposed campaign strategy and budget on 22 August 2007, and the campaign's detailed operational plan for implementation on 29 November 2007.

The South African *Kha Ri Gude* National Literacy Campaign (DBE 2008) was finally launched in 2008 and has proved to be successful in achieving the targets set by the committee. This article outlines the features which have contributed to its success<sup>4</sup> despite the many challenges it initially faced, and focuses, in particular, on the model employed for assessing learner achievements using an approach tailored to the campaign's specific context. As will be discussed in the sections which follow, the campaign utilised a continuous standardised assessment tool both for measuring learning outcomes and for monitoring and ensuring accountability in the campaign.

<sup>3</sup> The South African National Literacy Initiative (SANLI) was launched in 2000.

<sup>4</sup> The *Kha Ri Gude* campaign has won a number of national awards, including the Pan South African Language Board (PanSALB) award in 2010, which gave recognition for the excellence of the campaign materials in all 11 official languages. Other awards include the Government Communication and Information System's Umbungsweti Award (in 2009) for the campaign's developmental communication and advocacy strategy reaching adults in the most remote and impoverished sites and its efforts to include deaf and blind learners; and the Expanded Public Works Programme (EPWP) award (in 2012) for its effective delivery to the poor and also for job creation through its volunteers (who received stipendiary compensation). The campaign was formally evaluated by UNICEF in 2009 (Osman 2009), and its assessment strategy and learner assessments are verified by the South African Qualifications Authority each year.

## The local and international context of the *Kha Ri Gude* literacy campaign

The *Kha Ri Gude* literacy campaign formed part of the post-apartheid government's efforts to provide redress for millions of South Africans who had been denied an education. The campaign was conceptualised amid the emergence of a range of international and national policies and declarations, including:

- (1) Education for All (EFA) Goal 4 (UNESCO 2000), which committed South Africa to reducing its adult illiteracy rates by half by 2015. Translated into South African figures, this meant that the *Kha Ri Gude* literacy campaign aimed to reach 4.7 million adults.
- (2) the Bill of Rights, chapter 2 in the *Constitution of the Republic of South Africa* (RSA 1996), which recognises education as a human right and refers specifically to the right to a basic education, including adult basic education (ABE) in an official language of choice as (a) an inalienable right (ibid., Sections 29[1,2] and 9[3]), and (b) a prerequisite for the development of personal, social, economic and political empowerment. While the right to a basic education was upheld in the policies of post-apartheid South Africa (post-1994), in practice the delivery of adult basic education fell short of honouring this right, hence the decision to launch the *Kha Ri Gude* literacy campaign.
- (3) In line with the United Nations *Convention on the Rights of Persons with Disabilities* (UN 2007), ratified by South Africa in 2007, the campaign recognised the inclusion of persons with disabilities as both a fundamental right and also a prerequisite for their enjoyment of other rights. Literacy for people with disabilities was central to the strategy which made provision for blind, deaf and other disabled learners.<sup>5</sup>
- (4) In addition, the campaign was informed by the South African *National Qualifications Framework* (NQF)<sup>6</sup> to ensure equivalence with the formal schooling system and to make manifest the continuum of literacy and lifelong learning. The NQF accredits standards (Unit Standards, abbreviated US in South African terminology) which culminate in qualifications for all levels of learners.<sup>7</sup> The Unit Standards for qualifications, assigned to specific NQF levels<sup>8</sup> informed the development of the campaign curriculum, providing target steps in terms of learning outcomes, quality and assessment statements. These quality criteria determined the level, range and criteria for assessing

<sup>5</sup> This resonated with the Department of Education's White Paper 6: *Special Needs Education: Building an Inclusive Education System* (DoE 2001).

<sup>6</sup> The development and implementation of the National Qualifications Framework was prompted by the passing of the South African *Qualifications Authority Act* (DoE 1995).

<sup>7</sup> "A Unit Standard is the smallest unit that can be credited to a learner. Unit Standards can stand alone, but are generally part of a qualification" (SAQA 2001, p. 40).

<sup>8</sup> As per the *National Qualifications Framework Act*, implemented in 2009 (DoE 2009), the NQF has ten levels, organised into three bands: (1) General Education and Training (GET), which includes Compulsory formal schooling up to Grade 9 and Adult Basic Education and Training (ABET); (2) Further Education and Training (FET), which includes Grades 10–12 as well as vocational training; and (3) Higher Education and Training (HET).

such outcomes. In this sense, appraisal in accordance with the relevant assessment criteria has played a critical role in the development of the assessment model used by the campaign to determine the abilities and achievements of learners.

The *Kha Ri Gude* literacy campaign levelled its curriculum and its designated achievement outcomes as being equivalent with Grade 3 of the General Education system.<sup>9</sup> The South African Qualifications Authority (SAQA 2005), refers to the transformative elements in the South African context, where “equivalence” is intended to open up access to education and training pathways which have previously been closed to disadvantaged learners. I have explained elsewhere (McKay in press) that the recognition of equivalences draws attention to the similarities in the level and depth of learning and in the key or core skills which are common to the different contexts of learning (SAQA 2005, p. 26), and is intended to aid portability and horizontal (life-wide) and upward (lifelong) progression.

The NQF’s General Education and Training (GET) Band (see footnote 8) and the four Adult Basic Education and Training (ABET) sublevels (see footnote 12), equivalent to grades 1 to 9 of schooling, make theoretical provision for literacy as a continuum. The NQF itself, and indeed the *Adult Education and Training (AET) Act* 52 of 2000 (DoE 2000), both refer specifically to the continuum of lifelong learning made possible through the National Qualifications Framework.

Lifelong learning in terms of the AET Act (ibid.), which informed the design of the *Kha Ri Gude* National Literacy Campaign, recognises literacy as being integral to a lifelong learning approach. In addition, the AET Act emphasises the need to ensure an interface between the ABET levels on the NQF within General Education and Training (GET) to provide adults and youth with opportunities and learning paths leading into Further Education and Training (FET; equivalent to the level of South African school grades 10 to 12). The AET Act makes provision for integrating formal and informal learning and for establishing equivalences between ABET levels and GET levels of schooling as well as technical and vocational education.

These objectives of the *Kha Ri Gude* literacy campaign (summarised in Table 1) should be seen as part of a larger developmental vision in which ABET and basic literacy acquire meaning in the context of lifelong learning and for which the NQF provides the continua framework.

### **Some features critical to the success of the South African *Kha Ri Gude* mass literacy campaign**

In 2008, after two years of planning, the *Kha Ri Gude* literacy campaign was approved by the South African Cabinet. The campaign provides, at no cost to the learners, 240 hours of tuition based on pre-planned lessons and prepared core

<sup>9</sup> The General Education and Training (GET) system encompasses primary (Grades 1–3), and lower secondary school (Grades 7–9).

**Table 1** Conceptual components of the *Kha Ri Gude* literacy campaign

| Conceptual aspect                                                    | Policy framework                                                                                                                                                                                             | Main objectives                                                                                                                                                                            |
|----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Improvement of national literacy rates in general                    | Education for All (EFA) Goal 4 (UNESCO 2000)                                                                                                                                                                 | Commitment to reduce adult illiteracy rates by half by 2015                                                                                                                                |
| Human rights: (adult) basic education; in a chosen official language | Bill of Rights, Chapter 2 in the <i>Constitution of the Republic of South Africa</i> (RSA 1996)                                                                                                              | Recognition of education as a Human Right with particular reference to the inalienable right to a basic education, including adult basic education (ABE) in an official language of choice |
| Human Rights: inclusion of blind, deaf and other disabled learners   | United Nations Convention on the Rights of Persons with Disabilities (UN 2007)<br>Department of Education's White Paper 6: <i>Special Needs Education: Building an Inclusive Education System</i> (DoE 2001) | Recognition of the inclusion of persons with disabilities as both a fundamental right and also a prerequisite for their enjoyment of other rights                                          |
| Certifying equivalence with formal education;                        | South African <i>National Qualifications Framework</i> (NQF) Act 67 of 2008 (DoE 2009)                                                                                                                       | Recognition of prior learning, ensuring equivalence with the formal schooling system by accrediting Unit Standards                                                                         |
| Recognising literacy as integral to a lifelong learning approach     | <i>Adult Education and Training</i> (AET) Act 52 of 2000 (DoE 2000)                                                                                                                                          | View of literacy skills as part of a lifelong learning continuum                                                                                                                           |

materials developed in all 11 official South African languages.<sup>10</sup> Learners with disabilities are specifically accommodated through the allowance of more time for learning, and also through the campaign's provision of workbooks in Braille or large print for visually impaired learners, as well as the provision of assistive teaching devices for deaf learners.

In practice, the campaign has been successful in recruiting and retaining its learners and ensuring that learners achieve measurable learning outcomes. While research shows that adult literacy provision is often hampered by high learner attrition, the *Kha Ri Gude* literacy campaign seems to be an exception in that it has uncharacteristically high learner retention and completion rates. The critical features built into the campaign have contributed to its success.

## Curriculum issues

In the interest of directing its programme towards a developmental agenda, the *Kha Ri Gude* literacy campaign applies a thematic approach to the teaching of reading, writing and numeracy. The materials are designed to optimise the social, economic and developmental opportunities of literacy acquisition by ensuring that Millennium Development Goal (MDG)-related issues are infused into the curriculum, with

<sup>10</sup> The 11 official languages are: Afrikaans, English, Ndebele, Sepedi, seSotho, siSwazi, xiTsonga, seTswana, Tshivenda, isiXhosa and isiZulu.

lessons specifically addressing life skills concerning health, hygiene, nutrition, entrepreneurship, HIV/AIDS, gender, democracy, human rights and environmental awareness (UN 2000). These social issues are mainstreamed across the curriculum and encourage learners to think about related matters, make applications to their everyday lives and broaden the choices and opportunities available to adults.

Each of the pre-designed lessons aims to enhance learners' understanding of their rights and responsibilities while they learn the mechanics of reading, writing and numeracy. At the same time, the lessons are constructed to enable learners to become competent in the learning outcomes described and targeted in individual national Unit Standards, the assessment of which forms the central part of this article.

## The decision to provide core materials

The debate as to whether learners should be provided with core materials has been ongoing amongst the proponents of New Literacy Studies (Brian Street, Alan Rogers and Mastin Prinsloo) which reconceptualised literacy as “multiple literacies” reproduced in social and cultural practices which always take place within a context of power relations, rather than a set of universal skills applied in all contexts. Advocates of the New Literacy Studies (Archer 2003; Rogers 2006; Prinsloo and Breier 1996) thus argue for literacies across diverse contexts, arguing that materials need to be developed in situ by the educator/facilitator. *Reflect* programmes (Archer 2003, p. 46), for example, establish the specific literacies of learners' domains and then use the results as a basis of learning in literacy circles.<sup>11</sup>

Brian Street and New Literacy Studies (NLS) heavily influenced literacy schemes in South Africa in the mid-1990s. In particular, the work of Mastin Prinsloo and Mignonne Breier (1996), whose ethnographic research to determine the actual, everyday literacy practices of particular illiterate or semi-illiterate groups, influenced many of the small-scale literacy initiatives in South Africa.

Having taken cognisance of the views of NLS in relation to adult literacy programmes, the MCL agreed that *Reflect*-type approaches would not be implementable for a South African mass literacy campaign targeting 4.7 million adults who would be taught by 40,000 volunteer facilitators. The risks of following such an approach would be exacerbated by the fact that the volunteers were not a permanent cadre and were largely untrained. Alan Rogers (2006, p. 8) in fact conceded that NLS had not worked out the implication for training for adult literacy learning programmes (ALLPs) and training of literacy educators (TOLE). He points out in this regard that “the implications of this are still being worked out” (ibid., p. 8).

<sup>11</sup> “*Reflect* uses participatory and visualisation approaches as the basis for learning with the intention of determining learners' learning needs. Visual approaches are of particular importance (calendars, diagrams, maps, etc....) and can provide a structure for the process. However, many other participatory methods and processes are also used, including theatre, role-play, song, dance, video or photography” (Reflect 2009).

### *Developing core learner support materials*

Hence, while acknowledging the NLS approaches, and specifically the ideas underpinning the *Reflect* model, the *Kha Ri Gude* literacy campaign opted for the development of core national materials, which were moreover versioned to cater for various language and cultural differences, and regionalised insofar as languages were regional. The materials development team also ensured that the lessons were themed in accordance with MDGs, and that the relevant national and provincial development strategies were infused into the themes. While the thematic approach provided the general context for literacy, the methodology for the core materials was informed by research into the efficacy of phonemic awareness, specifically orthographic rime and grapheme–phoneme correspondence; and neuroscientific research, specifically on reading accuracy and fluency.

The decision to design national core materials (which catered for regional differences) was a response to the following questions:

- Could volunteer facilitators with minimal training determine the learning needs of their learners and design materials in accordance with those individual needs?
- Would it be possible for the campaign to meet the national learning standards if materials were designed locally by volunteer facilitators in situ?
- Would it be possible for volunteer facilitators across the country to teach phonemic awareness without language-specific guidance?
- Would it be possible to implement a campaign in 11 languages without a national set of core materials?

In addition to the concerns noted above, the ministerial task team ensured that the development of the core materials was consistent with the learning outcomes defined by SAQA for each level. The envisaged learning outcomes were themselves developed in consultation with a range of stakeholders including academics, practitioners, representatives of trade unions and learner associations. The NQF's national Unit Standards were useful in determining the level and range of the competencies to be met and standardised across languages. While the languages and the illustrations were versioned, materials were customised in accordance with the socio-cultural background of the learners, the appropriateness of the register and linguistic peculiarities. The versioning process aimed to ensure the achievement of specific learning outcomes for learners across the languages, while also ensuring that learners were assessed against the same assessment criteria.

The rigour of the Unit Standard development process afforded the campaign a certain degree of confidence in designing the curriculum and course materials. The versioning of the core materials for the campaign and the versioning and standardisation of the learner assessments were based on the expected learning outcomes for ABET (sublevel 1).<sup>12</sup> Ensuring standards and their comparability across languages required the campaign to draw on the expertise of language practitioners for each of the 11 official languages. In the main, materials were co-

<sup>12</sup> ABET occupies the first level on the NQF. This level 1 comprises 4 sublevels which are equivalent to grades 3, 5, 7 and 9 of the formal schooling system.

developed with language practitioners working simultaneously. Phaladi Moses Sebate (2014, p. 3), who examined the process employed for the versioning *Kha Ri Gude* materials, points out that while translation scholars generally agree that in their experience a clear brief from the originator or initiator is rare, the *Kha Ri Gude* development team found that their brief was explicit, requiring “versioning” rather than “translating” campaign materials into the 11 official South African indigenous languages. Sebate enumerates the endeavours undertaken to ensure that the materials and assessments were versioned and standardised across the languages:

- ongoing meetings and debates ensured a common understanding of how the versioning would proceed;
- versioners needed to be familiar with the socio-cultural background of the learners, their ages, the appropriateness of the register, and linguistic peculiarities;
- versioners were required to ensure that all illustrations were adjusted to suit the specific socio-cultural context of the learners in each of the languages. They were accompanied in this task by a sociologist who ensured race, class and gender correctness;
- versioners were required to regard the source text as a trigger for creativity and artistry to incorporate the appropriate cultural and linguistic aspects;
- screeners needed to ensure that books and assessments were subjected to a rigorous screening exercise involving language advisors and sociologists;
- texts and assessments needed to be piloted by a sample of typical educators on learners at the specific level;
- engagement with external practitioners and language boards had to be kept up continuously for qualitative inputs and further refinement of materials. Language boards were required to verify any new words which were coined in the development process; and
- materials had to be adapted based on the feedback from the field. (Sebate 2014, p. 4).

Sharing his own experience, Sebate (2014, p. 3) cites Christiane Nord (1992) and Koliswa Moropa (2012), who contend that texts should be versioned within the *skopos* or purpose of the translated text. Accordingly, knowledge of the intended recipients of the target text is critical. Moreover, he argues that it is incumbent on the versioner to be aware of the socio-cultural world of the target group and their own expectations and communication needs which they will seek in the text. For the text to conform to the socio-cultural context, Sebate contends that the versioner must have communicative competence in both the source and the target language, know the difference between the spoken and written variants of the target indigenous language and be well-versed in the knowledge of the socio-cultural contexts of the target group.

The *Kha Ri Gude* development team – which included language authors from across the official languages (representing regional languages and their cultures), designers, illustrators, photographers and editors – worked simultaneously to develop the first drafts of the core materials, which were reviewed in various ways. Each lesson begins with a picture code, (following a Freirian approach), to

encourage and contextualise the discussion around the key sentence. Moreover, the organising themes encourage learners to think about related social issues and to apply what they have learned to their lives and contexts while ensuring that they develop decoding and other skills necessary for fluency and comprehension.

In her evaluation of the campaign materials on behalf of SAQA, Melissa King indicated that the campaign materials were successful in terms of the following criteria:

- **Relevance:** It was found that the themes and contexts for real life and practical situations existed and that there was a balance between functional and transactional texts and personal texts.
- **Motivation:** It was found that the facilitator guidelines included suggestions on how to strengthen motivation, reinforce and encourage learners and that they offered practical applications.
- **Interactive and activity-based learning** was embedded in the materials.
- There was an acknowledgement of prior learning and experience.
- The programme included skills and processes to activate the critical crossfield outcomes of communication, working with others, problem solving, etc. (King 2012)

## Converging with New Literacy Studies

In addition to providing the core materials, *Kha Ri Gude* volunteer educators/facilitators are encouraged to further explore any of the learners' individual learning needs (based on the specificity of their contexts) which may not be sufficiently dealt with in the core materials, and to ensure that learners' specific needs are addressed during the course of the programme. While NLS would rely to a greater extent on the sourcing of authentic texts (Archer 2003; Rogers 2006; Prinsloo and Breier 1996), the core materials developed for the *Kha Ri Gude* literacy campaign include examples of authentic materials such as timetables, calendars, various forms to be completed and so on. To complement the core materials, *Kha Ri Gude* facilitators are encouraged to obtain authentic materials, posters and pamphlets from other ministries, churches, clinics, unions, and non-governmental organisations (NGOs) which can assist them in fine-tuning their lessons to meet individual learner needs in addition to working on the core materials.

Some of the more personalised needs learners have brought with them to classes were: How to apply for a driver's license, how to read the Bible or a hymn book, how to read a child's school report, how to calculate a budget for a small business initiative, how to apply for a social grant, and how to use a cell phone. Facilitators were encouraged to ensure that they addressed and catered for these specific needs by the end of the campaign term. The inclusion of these authentic reading, writing and calculating interventions is consistent with the NLS quest for the practice of reading and writing to be relevant in specific situations so that the learner may obtain or communicate specific information within a specific context (Archer 2003; Rogers 2006; Prinsloo and Breier 1996).

In designing the core texts for *Kha Ri Gude*, cognisance was however also given to the limitations of NLS. Street himself acknowledges limitations of overemphasising or romanticising “local” literacies which are often the result of influences from elsewhere, and furthermore that “local people” often adopt practices brought into communities – hence he speaks of hybrid literacy practices (Street 2003, p. 80), a concept with which *Kha Ri Gude* concurs. Nevertheless, the challenges experienced by the facilitators in providing (supplementary) authentic literacy materials validated the decision to provide adequate and varied core materials.

### **The model of assessment used by the *Kha Ri Gude* literacy campaign**

Over the past two decades there has been a shift in the discussions about how to measure the quality of literacy and other educational programmes. The World Conference on Education for All (WCEFA), at Jomtien in 1990, highlighted the critical role of measuring learning achievement to guide our judgments on the quality of education programmes. It made an appeal that we go beyond the use of proxy indicators such as measures of learner participation or completion rates or the number of contact hours in attempting to gauge the success of learning programmes. Rather, it stressed the importance of directly assessing learning outcomes, suggesting that programmes might utilise learner assessments to improve learning (Haddad et al. 1990).

Similarly, the *Dakar Framework for Action* (UNESCO 2000) emphasised that the implementation of adult literacy requires a greater focus on both the quality of literacy services and more rigorous ways of assessing learning achievements. The *Global Report on Adult Learning and Education* (UIL 2009, p. 147 calls for collecting improved and current data on learner participation in adult education and literacy programmes, specifically in terms of adults’ achievement levels in literacy classes. Accurate data are a basic necessity for conceptualising quality in terms of learning outcomes and programme results, and assessing learning that emphasises recognition, validation and accreditation – all of which are important steps towards establishing a system of lifelong learning. The authors of the Conclusion relate the poor quality of monitoring and the consequential lack of feedback to the low quality of literacy programmes.

In the same vein, John Aitchison and Hassana Alidou (2009, p. 17), in their review of literacy provision on the African continent, note that “most countries have difficulty generating straightforward statistics on provision – on the number and types of programmes, formal and non-formal, and on the number of learners involved, and on what their learning achievements are.” They point out that “National data are unable to show trends. Longitudinal data covering the last decade is rare, and background information is usually absent.” Overall, Aitchison and Alidou (2009, p. 32) lament that literacy provision in sub-Saharan Africa did not seem to be governed by any standards, quality assurance mechanism or national assessments covering all programmes.

Similar challenges underlie the quest of the *Belém Framework for Action*, the outcome document of the Sixth International Conference on Adult Education (CONFINTEA VI), for reliable data on the uses and impact of literacy programmes

and, importantly, on measuring the performance and effectiveness of these programmes, resulting in an explicit plea for valid and reliable quantitative and qualitative data to inform policy-making in adult learning and education (UIL 2010, p. 6).

## Developing an assessment strategy for the South African literacy campaign

Against this backdrop, the South African literacy campaign was challenged with designing a system of assessment which was valid and reliable as well as practical and implementable in the mass-based context of the *Kha Ri Gude* literacy campaign. The assessment model needed to take into account the fact that the approximately 600,000 literacy learners reached each year were dispersed across the country, and that most of the 40,000 learning venues available in the communities were informal sites such as shacks, mud huts, under trees, homes, prisons and churches, and in some cases schools. The assessment process needed to be sufficiently robust to be conductable in these informal settings.

### Assessment integrated into the broader monitoring system

It was necessary to design a model for learner assessment which was integrated into the campaign's broader monitoring and evaluation strategy, would facilitate reporting on the individual learner's assessed progress at various points in time over the programme but would also serve as a monitoring tool for the campaign as a whole. Mark Richmond et al. (2008, p. 68–69) indicate that adult education learner assessments are useful for the broader monitoring of programmes in that they answer the question whether indeed learners have achieved the envisaged learning outcomes (knowledge and skills) by the end of the programme.

In endeavouring to answer these kinds of questions, the *Kha Ri Gude* development team decided to use a common assessment framework which could both assess and document learner achievement, and which could also provide systemic information needed to monitor the delivery and quality of teaching and learning. To be fit for purpose, the assessment system had to be:

- scalable in order to assess 600,000 or more newly literate adults per annum;
- teacher-friendly to enable some 40,000 un- or under-trained volunteer literacy facilitators to utilise the tool;
- implementable in non-formal settings because the large majority of the 40,000 learning sites were in homes, churches, etc., in conditions which were not ideal for conducting assessments;
- suitable for versioning into the 11 official South African languages so that each learner could be assessed in his or her mother tongue;
- adaptable for the visually- and hearing-impaired, and adapted for Braille in 11 languages;
- formative to assess the growing competencies of the learners;
- suitable for databasing each learner's assessment records, so they could be certified;

- suitable for a monitoring function reporting on the quality of implementation; and
- able to record the numbers of drop-outs and completers so that the campaign could report on retention and attrition rates.

The result was the development of a national standardised “*Yes I can*” Learner Assessment Portfolio (LAP) which was structured to gauge the quality of learning outcomes at various times during the programme. The format of the portfolio made it possible for the programme to be administered as a continuous assessment,<sup>13</sup> providing continuous internal evidence of learner achievements in literacy and maths. The assessment activities are competency-based, and are time-linked to the various stages in the six month programme of learning. As the instructions for the assessment explain:

The “*Yes I can*” *Learner Assessment Portfolio* (LAP) comprises 20 assessment activities, [10 for maths and 10 for literacy] each testing one (or a cluster of) level 1 learning outcome(s). The activities are graded from easy to more complex. Within a few weeks of starting classes learners should be ready to do the first mother tongue and numeracy assessment tasks. The portfolio suggests when in the programme learners should be ready to attempt each activity. The time indicators are guides because it is recognised that all learners will not be ready at the same time (DBE 2012, p. i).

The assessment was designed around the first ABET sublevel of the NQF level 1/GET Band 1 (see footnote 8) and as such forms part of the continuum of learning available to adults. The assessment employed at this basic level is therefore essential for facilitating the transition of learners into other areas of education and training. This linkage of the assessment with the broader education and training system allows learners access to the continuum of lifelong learning. In addition to receiving their core materials, each learner in the campaign is therefore given an assessment portfolio, in his or her first language/home language.

### Using Unit Standards to standardise the assessment

In designing an instrument for assessing learners’ progress, the *Kha Ri Gude* literacy campaign relied on the SAQA Unit Standards for ABET pre-level 1 (see footnote 12). A few examples of Unit Standards are provided in Table 2.

In order to standardise levels for literacy, SAQA Unit Standard 12440 requires learners to: “Use basic reading skills to respond to defined simple texts” (SAQA 2012). The standard refers to a chosen range of genres learners should be able to read, which include narrative, persuasive, factual and everyday information texts. It refers to the levels of complexity, the length of text, the complexity of sentences and the modes of assessing comprehension and writing. The assessment criteria for this Unit Standard specify what learning outcomes learners should demonstrate. The existence of this system enabled the standardisation of *Kha Ri Gude* assessments

<sup>13</sup> The campaign also developed a rapid tool to determine base-line measures for placing learners, since the level of schooling achieved was an unreliable indicator for placement.

**Table 2** A few examples of Unit Standards

| ID of Unit Standard | Title of Unit Standard (US)                                           | ABET band*   | Credits** |
|---------------------|-----------------------------------------------------------------------|--------------|-----------|
| 12440               | Use basic reading skills to respond to defined simple texts           | ABET Level 1 | 8         |
| 119633              | Use basic reading/receptive skills to respond to defined simple texts | ABET Level 1 | 8         |
| 12441               | Use basic writing skills                                              | ABET Level 1 | 6         |
| 119638              | Use basic writing/signing skills                                      | ABET Level 1 | 6         |
| 12439               | Use speaking and listening skills                                     | ABET Level 1 | 6         |
| 119630              | Use speaking/signing and listening skills                             | ABET Level 1 | 6         |
| 5708                | Write for a variety of different purposes and contexts                | ABET Level 1 | 6         |

*Source* SAQA searchable online database of Qualifications and Unit Standards <http://regqs.saqa.org.za/search.php?cat=unit> [accessed 26 May 2015]

\* NQF Level 1 comprises 4 ABET sublevels which are equivalent to Grades 3, 5 7 and 9 of the schooling system respectively, so ABET Level 1 is equivalent to Grade 3 in primary school

\*\* Credits are accredited to learners once they have acquired the skills of a particular Unit Standard. Completing a succession of Unit Standards, learners accumulate credits towards a qualification e.g. as equivalent to a grade in the schooling system, or towards a skilled profession such as a bricklayer at NQF level 2, which is a 5-credit qualification and would require the candidate to have Literacy and Numeracy at NQF Level 1

across languages. In addition, the Unit Standard embeds the critical crossfield outcomes which require learners to:

- identify and solve problems through the application of reading/receptive skills; and
- reflect on and explore a variety of strategies to learn more effectively: learning how to use reading/signing for learning/study (and for navigating their lifelong learning paths).

The above-mentioned Unit Standard and range statements were used to benchmark the core learner support materials and the learner assessments. They guided the development of the instructional rubrics included for each test item so as to assist facilitators with standardising their attainment scores. Because the assessments are finalised by facilitators in a group context, they build a shared understanding of assessment results.

### Challenges in implementing the assessments

Enabling 40,000 facilitators to administer the portfolios across the country proved to be difficult in spite of the simplicity of the design. Facilitators needed continuous training on how to implement the tool, and many difficulties associated with the implementation needed to be addressed in the first year of the campaign. Facilitators had difficulties in:

- knowing when to administer a particular assessment item;
- using the tool for formative as well as diagnostic purposes;
- interpreting the rubrics provided for each activity;
- making judgements on the quality of learners' answers;
- tallying the learner scores correctly (the *Kha Ri Gude* score sheets included specific scoring boxes for each activity to enable easy calculation);
- transcribing scores from the various activities to the mark sheet (this necessitated facilitators' checking each other's work for accuracy); and
- transcribing the learner's identity number correctly into the booklet. Incorrect entries made it impossible to capture the learner's marks on the database. This required additional controls by the supervisor (SAQA 2013).

These kinds of problems compelled the *Kha Ri Gude* team to provide ongoing training, and also to insist that facilitators completed the assessment activities themselves to be better able to administer them.

Moreover, although all assessments across the languages were based on a common assessment plan using the same standards and level descriptors, it was recognised that some of the assessment activities in some languages were more complex than in other languages. For example, in Tshivenda, where the language was not phonetically regular, or where the language uses diacritics, teachers reported that the requisite assessments were more difficult than they were in other languages. It was also noted that some learners had received their LAPs in the incorrect language – necessitating the dispatch of portfolio booklets in the correct languages.

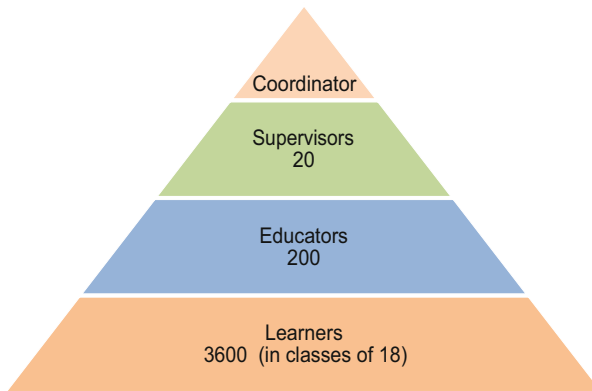
The national use of the instrument in the first year of the *Kha Ri Gude* literacy campaign gave rise to numerous revisions which needed to be undertaken to improve utilisation and standardisation across the languages. Revisions were also made to the mathematics assessments where language was relevant in, for example, “word problems”.

The monthly training greatly enhanced the facilitators' abilities to administer the tasks, especially when they collaborated with each other in reviewing and grading learner assessments.

## Procedures for administering the LAPs

The enormity of the task of assessing more than 600,000 learners on standardised instruments at 40,000 different sites (organised into 200 clusters) required establishing both an internal and an external monitoring system to ensure the integrity of the *mass* assessments. Internal monitoring processes include (a) class visits by supervisors, who visit each volunteer educator's class each month and monitor the facilitator according to predefined criteria; and (b) spot checks carried out by a team of external monitors<sup>14</sup> and the cluster coordinators.

<sup>14</sup> External monitoring is also carried out by the Department of Basic Education's internal audit department, the Auditor-General, National Treasury, SAQA and the Expanded Public Works Programme (who co-fund the campaign).



**Fig. 1** Cascade used for managing *Kha Ri Gude* literacy campaign clusters *Source* McKay 2012

### The assessment process

While the annual undertaking of assessing more than 600,000 learners on the standardised LAP across 40,000 different sites is enormous, the South African model for assessment makes it possible to conduct continuous *mass* assessments. The assessment format used by the *Kha Ri Gude* literacy campaign differs from the forms of assessment used by other campaigns which administer assessments to only a sample of learners (e.g. the Brazilian *AlfaSol* Campaign mentioned earlier), or as final summative tests (e.g. those used by the wider ABET system), or which use enrolment or class attendance as a proxy for attainment of competencies in literacy or numeracy.

The diagram in Figure 1 illustrates proportionally who is involved in supporting the programme and monitoring the assessment process for quality. Approximately 200 such cascades operate each year, to ensure the campaign reaches its targets and to support and monitor implementation:

- *the educator*, who facilitates the classes and administers the particular assessment tasks as learners achieve certain milestones;
- *the supervisor*, who monitors and supports ten educators. The supervisor's monitoring function includes ensuring that the assessments are carried out in due time at the sites and during moderation, and that the marking is accurate. He or she participates in centralised monitoring under the guidance of a coordinator who is responsible for controlling twenty supervisors; and
- *the coordinator*, who ensures that supervisors are carrying out their functions and that they are competent in doing so. In the marking process, coordinators ensure that all twenty supervisors moderate the work in terms of established criteria.

The processes which make this mass assessment possible can be explained as follows (McKay and Sekgobela 2015, pp. 31–38):

First, the campaign insists that all facilitators conduct regular assessment activities in the LAPs. The campaign supervisors also examine the learners' LAPs during their monthly monitoring visits by focusing on the areas that were found to be problematic such as the marks awarded, identifying when the learners were not progressing well, and controlling the regularity and consistency of learners' handwriting (to identify possible irregularities).

Second, the campaign regulates the flow of assessment documentation (the completed LAP) from the learner, which is transmitted via the supervisors and coordinators to the head office, and from there to the South African Qualifications Authority (SAQA) for verification. This requires courier, data-capturing and databasing capacity, all of which increased the campaign budget.

Third, after checking the course materials and LAPs for their alignment with ABET Level 1 on the NQF, the verification process carried out by SAQA examines a large sample of the completed LAPs to ascertain the general integrity of the marking. SAQA also examines the campaign databases of learner data to check that they satisfy the system requirements of the National Learners' Records Database (NLRD).<sup>15</sup> While these processes are essential for ensuring the integrity of the assessments, and of the campaign as a whole, complying with the rigorous administrative requirements of this was costly and also difficult given the 40,000 learning sites that had to be accounted for.

### The process of administering the LAPs

Table 3 outlines the various quality control measures put in place to ensure the quality of the marking. The use of an external body to authenticate and moderate the LAPs has proved to stabilise and rationalise the marking standard over the years. As indicated above, acclimatising facilitators to the mode of assessing for learning and then capacitating them to use the LAPs was necessary in ensuring their successful application. Table 3 also points to the need to transport the LAPs across various levels of control. Given the scale of the assessment enterprise, physical transportation and storage costs are significant: They need to be factored into the campaign budgets and projections, as do the verification workshops which involve transportation of coordinators from across the country to a central venue where they are accommodated during the verification workshops. Moreover, since governance regulations require that the LAPs are retained for at least three years for audit purposes, warehousing millions of LAPs is costly.

### Assessment accountability

Notwithstanding the challenges in establishing the LAPs as a mode of assessment for the *Kha Ri Gude* literacy campaign, the LAP assessment and the assessment processes provide an important source of information for establishing

<sup>15</sup> The National Learners' Records Database (NLRD) is "an integrated information system to facilitate the management of the National Qualifications Framework (NQF) – the first such system in the world" (Shapiro 2008, p. 1).

**Table 3** Stages of quality control throughout the *Kha Ri Gude* assessment process

| Stage | What happens                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1     | <p><i>Learners complete their Learner Assessment Portfolios (LAPs)</i></p> <p>Learners complete their LAP activities over the sixth-month period of the programme. The LAPs include 10 literacy assessment items and 10 numeracy assessment items. The assessments are competency-based and time-bound. Learners are required to complete them at certain stages of the programme or whenever they feel ready to be assessed on the test item. The test items are calibrated against national Unit Standards</p>       |
| 2     | <p><i>Learners finalise their LAPs</i></p> <p>All learners' LAPs are monitored during the programme by supervisors, coordinators and internal and external monitors. Towards the end of the programme, learners are required to complete any outstanding assessment activities</p>                                                                                                                                                                                                                                     |
| 3     | <p><i>Site-based marking of LAPs by facilitators</i></p> <p>Facilitators are required to mark/grade the LAPs as learners complete the activities. This allows for a diagnostic function, since learners are required to demonstrate their competencies. The LAPs provide a rubric, for each of the activities, to assist in standardising the marking. Learners are given feedback on their achievements. If a learner has not successfully achieved a learning outcome, he/she is required to repeat the activity</p> |
| 4     | <p><i>Site-based moderation of LAPs</i></p> <p>Supervisors collect the LAPs from the facilitators. The LAPs are co-moderated by groups of supervisors under the supervision of the coordinator</p>                                                                                                                                                                                                                                                                                                                     |
| 5     | <p><i>Site-based moderation of LAPs by the South African Qualifications Authority (SAQA)</i></p> <p>SAQA officials visit a sample of about 1% of the learning sites and examine the LAPs. They administer a written test to all learners which is subsequently compared with the learners' LAP assessments</p>                                                                                                                                                                                                         |
| 6     | <p><i>Verification and oversight by the coordinators</i></p> <p>Each coordinator is required to verify the LAPs within his/her cluster. This process serves a moderation function and also a quality assurance function. Any irregularities identified are addressed at this stage. Coordinators may require that certain activities or LAPs be re-marked, or even that learners redo certain activities</p>                                                                                                           |
| 7     | <p><i>Transportation of the LAPs</i></p> <p>The LAPs are sealed in special packaging provided by the <i>Kha Ri Gude</i> head office. A supervisor's report, with information on the number of LAPs submitted and the names of learners, is enclosed in the pack. The packs are collected by the campaign's courier service and transported to the centralised <i>Kha Ri Gude</i> warehouse</p>                                                                                                                         |
| 8     | <p><i>Data capturing</i></p> <p>The marks/grades of each learner are copied into the <i>Kha Ri Gude</i> database in anticipation of the moderation and verification by SAQA. The data are analysed by item, language, age and district</p>                                                                                                                                                                                                                                                                             |
| 9     | <p><i>SAQA verification</i></p> <p>SAQA verifiers and coordinators verify 10% of the marking, drawing a sample which is representative of all classes. The achievements of successful learners are uploaded onto SAQA's National Learners' Records Database (NLRD). This process is important for ensuring governance and for monitoring teaching and learning in the campaign</p>                                                                                                                                     |
| 10    | <p><i>Certification of learners</i></p> <p>Successful learners receive a statement of achievements issued by the Department of Basic Education. Award ceremonies across the country serve as advocacy for the campaign</p>                                                                                                                                                                                                                                                                                             |

Source McKay (in press)

accountability. Adult learners need, and want, to know what progress they are making with the programme. Assessment results provide feedback to learners regarding personal strengths and challenges; they also increase the motivation of learners based upon the achievement of their goals. The public is interested in the efficiency and effectiveness of services provided through the use of national revenue, and the assessments provide demonstrable results as expressed in learner achievements. The role of SAQA as a quality assurer for the assessments has increased the integrity of the assessments through stringent moderation and authentication of assessments. The fact that the literacy assessment results are verified by an external agency (SAQA) as valid and reliable is important for demonstrating accountability before the results are recorded on the South African National Learners' Records Database.

### **Linked with the broader education and training system**

The *Kha Ri Gude* programme is pitched at ABET level 1 with an equivalence to Grade 3 in the schooling system, and as such forms part of the continuum of learning available to adults. The assessment employed at this basic level is therefore essential for facilitating the transition of learners into ABET level 2 (equivalent to formal school Grade 5) or other areas of education and training.

### **Simplicity in assessing**

Bearing in mind that the facilitators are mainly untrained (youth) and that the assessments are conducted on a mass scale, it was necessary to ensure a smooth and simple way of administering them. To facilitate this, portfolios provide easy-to-use marking criteria for each activity, and an assessment grid/rubric for interpreting the learner's performance on each activity. As far as possible, assessment activities are quantified by a 5-score scale, as shown in the following example:

- 1 Learner requires immediate remedial action or even referral.
- 2 Facilitator should give learner more attention with particular sections of the work and let the learner reattempt the activity when s/he is more competent.
- 3 Learner has an average level of competence.
- 4 Learner is almost fully competent.
- 5 Learner is fully competent.

Facilitators are trained and given instructions on how to administer the assessments. They are encouraged to use the assessment as a diagnostic, reflexive instrument for providing feedback and for helping learners to see their progress, as well as understanding its being an integral part of the learning and continuous improvement processes of learning. However, as explained above, the implementation and the application of the assessment relies on continuous training and development of the campaign cadre, and in the beginning many of the assessments had to be returned to facilitators for corrections or for providing accurate information.

## What is assessed?

The LAP instrument tests learners against the skills described in the core workbooks. The test items are based on the content of the mathematics and language books, and are aligned with the learning outcomes for ABET level 1 (Unit Standards for ABET level 1 literacy and numeracy). The LAPs comprise 20 tasks which enable the assessing of learner competences. They also enable the monitoring of:

- curriculum coverage, because the tasks are paced according to the different stages at which learners should have developed certain competences;
- areas where learners may require remedial action;
- areas where learners need to improve, since the assessments make provision for learners to be re-assessed on the same test item at a later date when they feel they are more competent;
- learner achievement over time, since assessments are administered continuously throughout the programme; and
- areas where the facilitator's capacity might be improved.

## The design features of the instrument

The instrument had to be sufficiently teacher-friendly in order that (unqualified) campaign volunteer facilitators might administer the tool and interpret the outcomes properly. It had to be non-threatening so that learners would see it as an integrated and holistic part of their day-to-day learning. It was designed to provide learners with information on their own learning achievements as a means of motivating them. In this sense, the tool was formative and allowed for interventions to be made in good time.

## The language assessment instrument

The language assessment items operate at the level of testing learners' reading of words, sentences and text, each of which requires a set of skills. They test the learners' ability to read and to write text (in their first language), beginning by testing pre-literacy skills which include forming and copying shapes and letters.

The language component of the LAPs thus assesses the following:

- prose skills through which learners are assessed on their ability to read and comprehend continuous texts which are organised in paragraphs;
- document skills applied to non-continuous texts in different formats (schedules, charts, maps, etc.) where learners can use different literacy and decoding strategies to extract information and supply information; and
- the production of text to answer questions, and the production of letters or a short text on an everyday life activity.

Influenced by developments in neurocognitive science insights into reading, the language component includes a task for assessing accuracy and speed in reading high-

frequency words (isolated words, words in context and pseudo-words). This task was included to gauge the relationship between speed and comprehension. According to the work of Helen Abadzi (2008, 2006, 2003), a speed of at least 45 words per minute is a necessary precondition for learners being able to read with understanding. Abadzi argues that learners who do not achieve a reading speed of about 45 words per minute (wpm) run the risk of forgetting the beginning of the sentence by the time they have slowly worked out the words and reached the end of the sentence. In discussion with Abadzi, the target wpm rate was adapted for the African languages.

The problems associated with assessing learners' proficiency across all the 11 national languages discussed earlier in this article were especially apparent in assessing learners' reading speeds across languages – requiring language experts to ensure the comparability of words and text across languages.

### **The numeracy assessment instrument**

In order to assess numeracy, the competencies assessed are being able to

- read and write numbers up to 1,000,
- count and/or estimate a number of items;
- record the number and amount in writing (in numerals and in words);
- identify and name geometric shapes;
- use the basic numeracy skills across the four arithmetic operations (adding and subtracting, multiplying and dividing) as applied to everyday life situations;
- calculate using 100s, 10s and units;
- calculate money and budgets;
- understand simple fractions (halves and quarters);
- understand basic measurements (kilometres, metres and centimetres, kilograms and grams); and
- read a watch and a calendar.

### **Capturing learning achievement results**

Since each learner's scores are captured for purposes of certification, the scores provide important monitoring information and feedback on the campaign strategy. The mark sheet shown in Figure 2 enables easy data capturing and demonstrates the different kinds of assessment tasks which learners are required to do.

### **The scope of the LAP assessment instrument**

The LAP approach developed by the *Kha Ri Gude* literacy campaign was considered to have a number of advantages over the administration of examinations or the administration of sample-based testing. While it is recognised that facilitators experienced initial challenges with the implementation of the LAPs, over the years these challenges have been reduced. Some of the main features which characterise the assessment of the model are discussed in the next paragraphs and summarised in Table 4.

| Learner's marks                                                                                                                     |                                     |      |                                |                        |
|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|------|--------------------------------|------------------------|
| Each time the learner successfully completes an activity, enter his or her marks in the space next to the relevant activity number: |                                     |      |                                |                        |
| Mother tongue                                                                                                                       | ACTIVITY NUMBER                     | Mark | ACTIVITY NUMBER                | Mark                   |
|                                                                                                                                     | 1 Writing my name                   |      | 11 Writing numbers             |                        |
|                                                                                                                                     | 2 Filling in a form                 |      | 12 Counting                    |                        |
|                                                                                                                                     | 3 Reading signs and words           |      | 13 Numbers and counting        |                        |
|                                                                                                                                     | 4 Reading speed                     |      | 14 Addition and subtraction    |                        |
|                                                                                                                                     | 5 Telling the time                  |      | 15 Multiplication and division |                        |
|                                                                                                                                     | 6 Calendars and dates               |      | 16 Fractions and shapes        |                        |
|                                                                                                                                     | 7 Comprehension                     |      | 17 Compiling and calculating   |                        |
|                                                                                                                                     | 8 Comprehension                     |      | 18 Reading for information     |                        |
|                                                                                                                                     | 9 Writing a description             |      | 19 Measurements and distance   |                        |
|                                                                                                                                     | 10 Writing a letter to the Minister |      | 20 Revision                    |                        |
| Mother tongue TOTAL out of 50                                                                                                       |                                     |      | Numeracy TOTAL out of 50       |                        |
|                                                                                                                                     |                                     |      |                                | Total combined mark    |
|                                                                                                                                     |                                     |      |                                | <input type="text"/> % |

**Fig. 2** *Kha Ri Gude* mark sheet assessing language and numeracy skills Source DBE 2012, p. i

**Table 4** Main features characterising the *Kha Ri Gude* assessment model

| Feature                                      | Effect                                                                                                                                                                                                                                                                                           |
|----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assessment <i>for</i> learning               | Learners are motivated to continue learning by their own acknowledged and documented progress                                                                                                                                                                                                    |
| Portability                                  | Learners can continue participating even if they relocate to a different region or province; imprisoned learners can continue even if they are moved to a different prison                                                                                                                       |
| Learner-centredness                          | Learners acquire self-assessment skills and a sense of agency                                                                                                                                                                                                                                    |
| Individual learning pace and language choice | Learners can complete units in their own time and, if necessary, re-attempt tasks they have not mastered; learners are taught and assessed using the core materials in their own language (one of the 11 official South African languages); they are also able to bring authentic texts to class |
| Integratedness                               | Assessment is integrated into everyday teaching and learning practice in a non-threatening manner                                                                                                                                                                                                |
| Diagnostic and formative uses                | Learners' weaknesses can be pinpointed and addressed at an early stage, thus helping learners to build up their skills                                                                                                                                                                           |
| Transparency                                 | The transparency of the performance criteria and expectations, included with each assessment task, enables learners and facilitators to negotiate manageable goals                                                                                                                               |
| Adaptability                                 | Assessments are adaptable for learners with special needs                                                                                                                                                                                                                                        |
| Validity                                     | The standards in place enable viable certification of learners' credits                                                                                                                                                                                                                          |
| Completion rate                              | Learner retention and completion rates (measured by the return rate of completed LAPS) are uncharacteristically high                                                                                                                                                                             |

## Assessment for learning

The *Kha Ri Gude* LAP has been designed specifically to enhance learning. According to Kathryn Ecclestone et al. (2010, p. 32), there is widespread support for formative assessment or assessment *for* learning, as distinct from assessment *of* learning. Ecclestone et al. (ibid., p. 33) cite Paul Black et al. (2003, p. 9), stating that assessment for learning refers to assessments for which the first priority in design and practice is to serve the purpose of promoting students' learning.

Ecclestone et al. (2010, p. 32) contend that assessment activities can help learning if they provide information to be used as feedback by teachers and learners so as to modify the teaching and learning activities in which they are engaged. Such assessments become formative when the evidence is used to adapt the teaching to meet learning needs and to encourage self-assessment as learners work towards achieving set goals. Similarly, Ane Qvortrup and Tina Bering Keiding (2015, p. 407) argue that the shift in assessment practices towards formative, process-oriented portfolio assessments with transparent assessment criteria offers opportunities for scaffolding learning and for motivating learners on the strength of their growing competences through what Ecclestone et al. (2010, p. 34) refer to as "the pedagogy of engagement".

In line with the pedagogy of engagement, the *Kha Ri Gude* LAPs have required learners to review their own progress in relation to strengths and weaknesses, to set themselves goals for future learning and achievement, and to retry activities where they have not been successful. The LAPs encourage peer work, and learners are encouraged to cooperate and assist each other. At the individual level, the learner is made aware of the assessment criteria for the task he or she is attempting, while facilitators provide immediate feedback to learners on assessed work "in a kind way", so as to promote learning and facilitate improvement. It is necessary to engage learners and peers in the assessment processes, and to allow learners to repeat activities at a later stage if necessary.

The LAPs present assessment tasks at various times throughout the programme when learners are believed to have achieved certain competency milestones, giving them an opportunity to gain a sense of their own agency in learning and assure them that they can improve on their outcomes (Ecclestone et al. 2010, p. 50).

## Portability for learner migration

The *Kha Ri Gude* LAPs proved to be useful for learners whose adult lives required them to relocate for a variety of reasons. A substantial number of participating learners moved home, region or province, resulting in a high mobility rate. They were able to continue with their learning programme because they were able to relocate with all their learning material, including their LAPs. Ulrike Hanemann refers specifically to the advantage of the LAPs to incarcerated learners:

In the case of learners in prison contexts, the portfolio is helpful ("portable") in case an inmate is transferred to another prison during the six month period of the programme (Hanemann 2011, p. 6).

## **Learner-centredness**

In developing the assessment instrument, care was taken to ensure that the assessments were consistent with adult education principles, and that they would encourage learner participation in the assessment process. In practice, the LAPs enabled learners to provide appropriate evidence of their accomplishments, and provided a basis for learners and their facilitators to reflect on the results of the test item. Learners were able to participate in peer-supported processes to identify ways of improving their achievements.

Hanemann (2011, p. 6), who observed the moderation process of the assessments and interviewed some of the campaign coordinators, commented on the participatory nature of the moderation of assessments and also on the ease with which the assessment was implemented. She points out in this regard that the campaign “coordinators assessed the LAPs positively without exception because they are user-friendly, attractive in their presentation, and as a continuous practice help develop a culture of (self-)evaluation among learners” (ibid.).

David Nicol and Debra Macfarlane-Dick (2006, p. 2) point to the opportunities for self-regulated learning arising from well-structured formative assessments. As they put it, formative assessment refers to assessment which is “specifically intended to generate feedback on performance to improve and accelerate learning” and “offers students opportunities for self-regulation”.

## **Individual learning pace and language choice within comparable standards**

As Hanemann (2011, p. 6) points out, the assessments are implemented in flexible and personalised ways, allowing each learner to proceed at his or her own pace, allowing learners opportunities to retry activities where they wish to improve their competence. The assessment activities are closely aligned with core literacy materials, and are standardised across the languages. This means that learners perform the same tasks (in their own languages) and are assessed against the same criteria. This use of a standardised assessment framework enables the campaign to compare the functioning of the campaign and the achievement outcomes across regions, districts and classes over a period of time.

## **Integrated assessments**

The assessment approach was developed to be a regular, integrated, non-threatening assessment through which learners can demonstrate their growing competences in their personal LAP. The assessment is integrated into everyday classroom practice, and is administered at regular intervals, thus avoiding the artificial separation of assessment from teaching and learning. The LAP activities are conducted in the same way as all other class activities and the classroom therefore constitutes, for learners, a “safe place” for assessing, especially for those learners who had previously been failed by the schooling system and were left with a negative experience. This was especially important with learners who had been demotivated in the school system. Ecclestone et al. (2010, p. 175) in fact refer to the dilemma

adult educators face of creating a relaxed learning environment which enables learners to overcome barriers while at the same time recognising the accountability educators are subject to. They still need to ensure that learners achieve personalised learning goals and outcomes aligned with the national curriculum.

### Diagnostic and formative uses

In addition to assessing the achievements of individual learners, the LAP instrument is essentially diagnostic and “interventionist”, guiding improvements both at a systemic and an individual level. At the systemic level, where learning problems are more prevalent, the LAPs signal the need for a more general review and an action plan for improving the programme, the assessment, or the instructional strategies. Qvortrup and Keiding (2015, p. 1) refer to the shift in assessment practices “towards formative, process-oriented assessment”, with portfolios offering “established expectations in relation to transparency, the documentation of learning processes and achievements and for scaffolding learning.”

### Transparency of assessment

Each *Kha Ri Gude* LAP activity includes a rubric explaining the assessment criteria and scoring used for the specific test item, to clarify and simplify the standard. The simplified rubric enables the facilitator to interpret the meaning of the scores and, at a systemic level, it allows for the system to compare scores across learning items.

The method of applying the LAP subscribes to the view that learning is a collaborative activity. Both learner and teacher can determine when a learner is ready for a particular assessment and the simple rubrics provided make it possible for learners to be full participants in the assessment process, as the performance criteria and expectations are included with each assessment. Moreover, the negotiations between the learner, teacher and peers (and often family members) around the scores are useful in assisting the learner to develop the skill of self-assessment.

Ana Duboc (2009, p. 10) refers to assessments which are “collaborative, situated and negotiated” as being informed by the epistemologies of the critical theoretical tradition. She promotes the sharing of appraisals among teachers and learners, and more public and less vertical ways of negotiating criteria and scores in opposition to the hierarchical forms of assessment used in conventional teaching contexts.

The *Kha Ri Gude* facilitator groups thus double as communities of practice where the practice of knowing-in-action is encouraged. These groups are critical for developing the professional practice of the unqualified facilitators who, through guided reflection (in monthly meetings as communities of practice), are required to focus on areas which require attention. Facilitators are encouraged to consider ways of dealing with problems they encounter, to collaboratively analyse learner assessments so as to use these reflective conversations (as termed by Donald Schön 1983).

Nicol and MacFarlane-Dick (2006, p. 205) outline the value of clarifying the goals and expected assessment criteria for facilitating the development of self-

assessment and reflection *in learning* and for encouraging dialogue *around learning* (as opposed to merely the assessment *of learning*). These forms of assessment may encourage positive motivational beliefs and boost the self-esteem of learners as they see their growing competence and are able to recognise how to improve their abilities. Moreover, Nicol and MacFarlane-Dick indicate that transparent goals provide “information to teachers that can be used to help shape teaching.”

### **Adaptable assessments for learners with special needs**

As mentioned earlier in this article, the *Kha Ri Gude* literacy campaign has made a special effort to provide services to the blind and deaf. Blind and visually impaired learners are assessed on an instrument adapted specifically for Braille application. The Braille LAPs have been developed in all 11 official languages, making it possible for blind learners to be assessed on the same instrument as sighted learners, but with obvious adaptations for Braille (e.g. the removal of all graphics). The tests are compiled and answered in Braille and assess blind learners’ literacy and numeracy skills, as well as their ability to decode and create Braille text using their Perkins Braille writers.

Similarly, deaf learners, and those who are hard of hearing, are assessed using the same instruments as the mainstream learners, with the exception of the oral reading assessment activity. All deaf learners learn in English (with South African Sign Language as the medium of instruction). Other forms of adaptation are utilised for learners with other disabilities.

It serves to mention that the application of the assessments to learners with special needs has not been without problems. The ability to provide differentiated assessments at the same NQF level and testing the same learning outcomes has proved to be difficult at the point of the design of the instruments in Braille. Moreover, ensuring that the instruments are adapted across languages has required a great deal of skill and expertise. In the initial years of the campaign, these skills, including the skills for all official languages, resided in the *Kha Ri Gude* literacy campaign’s director for inclusive education, who, after leaving the campaign, left a vacuum in the production of the embossed materials and also in ensuring the quality and integrity of the assessments.

Ensuring that blind and deaf facilitators are able to implement the assessments has posed additional challenges for the campaign. These challenges, as well as the challenge of recording learner assessment scores, has necessitated the provision of extra (sighted) human capacity, additional training for blind volunteer facilitators to manage the differentiated assessments, and also additional time for learners with special needs to achieve the specified levels of attainment and be assessed.

### **Validated assessments**

In South Africa, adult basic learners were generally only issued with a certificate at the end of ABET level 4 (the equivalent of Grade 9 in the schooling system). However, the *Kha Ri Gude* literacy campaign issues certificates to its “graduates” at the level of ABET 1 (equivalent to Grade 3 in the schooling system), a sublevel on the

NQF. Hanemann refers to the effectiveness of the internal moderation and verification system involving the facilitators, their supervisors and the coordinators as

a learning experience and capacity development exercise for everybody. The participatory system of training, monitoring and strategic planning allows for exchange and mutual learning as well as a continuous improvement of the campaign structure and practices (Hanemann 2011, p. 6).

Although the assessments are low-stakes, SAQA nevertheless uses a rigorous approach for the moderation of the LAP samples in order to ensure the quality and authenticity of the internal (site-based) marking. In addition to verifying the learners' LAPs, SAQA also conducts its own site visits. For example, in 2011 SAQA conducted more than 300 site visits where it administered its own tests to provide evidence that the knowledge and skills reflected in the portfolios were those of the learners themselves (SAQA 2011, p. 3). King (2012) points out that while portfolio assessments generally have challenges with the standardisation of evidence in terms of authenticity, the standardisation of marking and moderation, the *Kha Ri Gude* literacy campaign has been able to manage these challenges by implementing very structured portfolio tasks for learner evidence and by providing detailed guidelines and formats for marking, as well as by providing facilitator training. After verifying the quality of the assessments, the achievements of the successful learners are recorded on the National Learners' Records Database (NLRD). Having observed the 2009 verification process, Hanemann concludes:

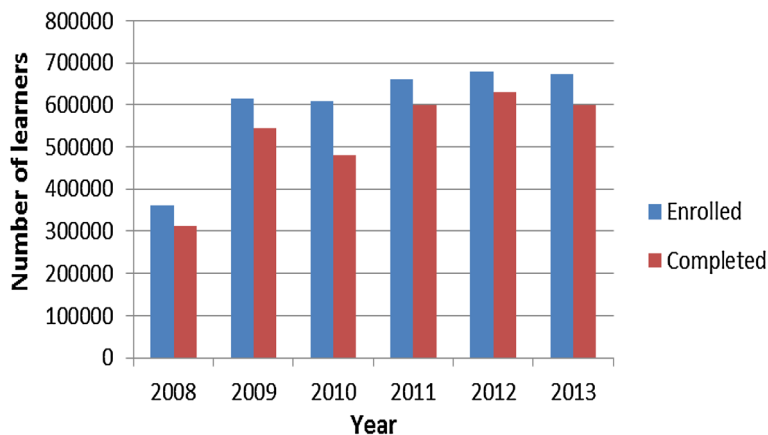
The campaign has set a well-orchestrated system to implement the process of standardised learner assessments within the framework of the South African National Qualification Framework (Hanemann 2011, p. 7).

## Completion rates

The return rate of the completed LAPs is a significant indicator (especially when triangulated) for determining attrition/survival rates, curriculum coverage, and quality of teaching and learning. Similarly, an incomplete LAP draws attention to the stage at which the adult learner exited the system or was unable – for various reasons – to complete the assessment process. While national and international research shows that adult literacy provision is often hampered by high learner attrition, the *Kha Ri Gude* literacy campaign has uncharacteristically high learner retention and throughput rates (see Figure 3), a phenomenon which can be attributed to the LAP processes having been tailored to the South African context.

## Extending the indicators

As part of its monitoring functions, the campaign maintains a database which affords the campaign many benefits: (1) It provides a record of learner achievements which are transferred to the SAQA National Learners' Registration Database. (2) It enables the campaign to manage an annual cadre of approximately 40,000 volunteer



**Fig. 3** Kha Ri Gude enrolments versus completion Source DBE 2013, p. 13 (Chart 1)

facilitators and the monthly stipends paid to them. (3) It assists in resource allocations and future planning. (4) It is able to report on the profiles of learners, their home language, enrolments, completers and dropouts and levels of achievement.

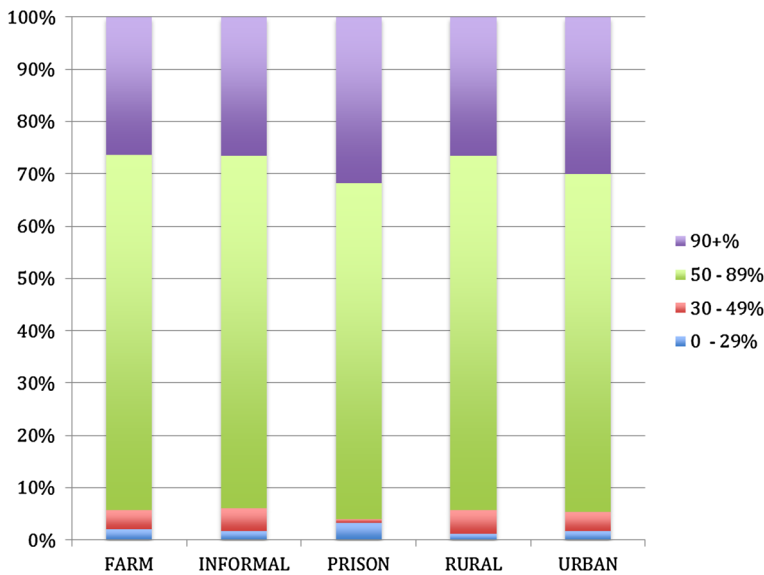
The database records learners' biographical information, including age, home language, type of residential area (informal settlement, village, etc.), gender, employment status, and whether they had had any prior learning, and if so, for how long. This enables the campaign to gauge how the system is performing, across sites, provinces or language cohorts, or the way in which clusters of learners or teachers are performing. For example, it was possible for the campaign to report on the following indicators: Combined literacy and numeracy performance by residential type (Figure 4); attendance patterns of learners who completed their LAP (Figure 5); literacy achievement by gender (Figure 6) and numeracy achievement by gender (Figure 7).<sup>16</sup>

The assessments are able to provide valuable information about the relationship between learning outcomes and learners' residential locations. As indicated in Figure 4, learners located in urban areas and also in prisons tended to achieve higher scores more often.

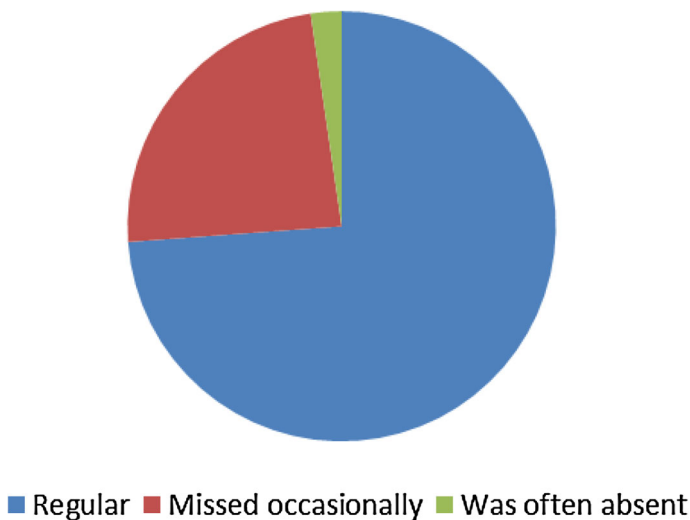
The LAP assessments across the languages were able to show which language groups performed best. Sesotho- and xiTsonga-speaking learners tended to obtain higher scores than learners of other language groups, and the Setswana language group had higher failure rates and lower scores of distinction (above 90%). These data were useful in guiding investigations into the performance of language groups and also the linguistic regions where learners do not perform as well.

It was possible for the campaign to correlate learner achievement and learner attendance. As indicated in Figure 5, learners who passed the assessments were more likely to attend class regularly. There were relatively few learners who completed their LAP despite being "often absent".

<sup>16</sup> These indicators are based on the 2011 campaign cohort.

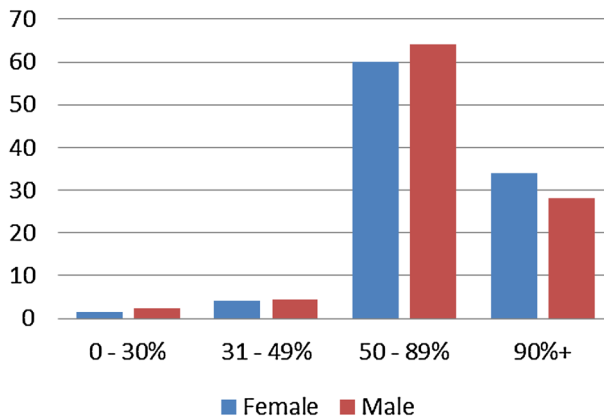


**Fig. 4** Combined literacy and numeracy performance by residential type, with the colours denoting the numbers of learners in each group in relation to the achievement scores attained *Source* DBE 2011 (Chart 2)

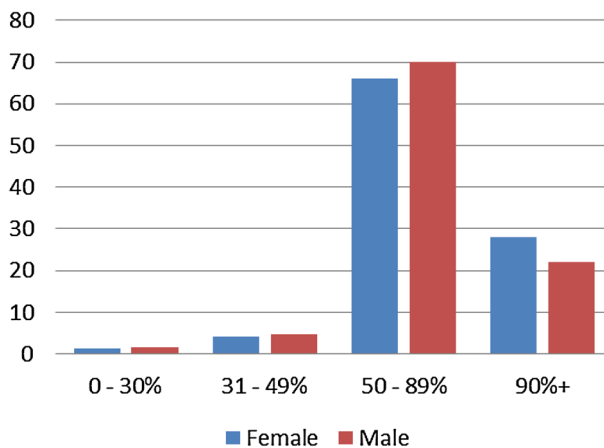


**Fig. 5** Attendance patterns of *Kha Ri Gude* learners who completed their LAP *Source* DBE 2011 (Chart 4)

In the literacy assessment tasks, men performed marginally better on average than women, except in the 90%+ range where women tended to score better than men (see Figure 6).



**Fig. 6** Literacy achievement by gender *Source* DBE 2011 (Chart 5)



**Fig. 7** Numeracy achievement by gender *Source* DBE 2011 (Chart 6)

Similarly, in the numeracy assessment tasks, men performed marginally better on average than women. However, more women scored 90% and above than did men (see Figure 7). Overall, numeracy scores were higher than the literacy scores.

## Conclusion

Clearly, the six-year experience with the *Kha Ri Gude* LAPs and the data generated from them, has contributed to a holistic understanding of the quality of learning. Moreover, the success of the implementation of the LAP assessment challenges the dominance of summative assessment, and demonstrates how continuous and formative assessment can enhance learners' motivation and autonomy, contribute to

the high retention levels of the campaign, and to the enhancement of quality and learning motivation. The LAPs have shifted the novice facilitator to the role of coach in guiding learners through their assessment tasks and have built up communities of practice for ensuring assessment rigour. In addition, the portfolios serve diagnostic and accountability functions, and have proved to be an easy almost “teacher-proof” mode of assessment. Overall, the indicators emanating from them have enabled and gauged the quality of a successful campaign, with advantages outweighing the challenges and costs.

The *Kha Ri Gude* LAP experience offers a viable option for other countries with a similar need for the assessment to drive the learning agenda as they respond to the United Nations Sustainable Development Goals beyond the benchmark of 2015.

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