



EARLY  
GRADE  
READING  
PROGRAMME

# SUBJECT ADVISOR STUDY

Can Instructional Coaching Be Integrated into South Africa's Education System?

A Study of External Coaches, Subject Advisors, and Department Heads



basic education  
Department:  
Basic Education  
REPUBLIC OF SOUTH AFRICA



This work was completed as part of the work managed by the Research Triangle Institute (RTI) International as part of the Gates Foundation Science of Teaching grant.

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**May 2023**

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## Acronyms

CAPS	Curriculum and Assessment Policy Statement
COVID-19	coronavirus disease of 2019
DH	department head
EFAL	English First Additional Language
EGRP	Early Grade Reading Programme
FP	Foundation Phase
EGRS I	Early Grade Reading Study I
EGRS II	Early Grade Reading Study II
PMT	Project Management Team
PRIMR	Kenya Primary Math and Reading Initiative
PSRIP	Primary School Reading Improvement Programme
RSP	Reading Support Project
SA	subject advisor
SPP	structured pedagogical program
TAC	teacher advisory center



## Abstract

External instructional coaching has been shown to be a critical component of improved learning outcomes in South Africa. However, such coaching is generally expensive and difficult to implement at scale. This study examines whether actors that already exist within the education system (namely, subject advisors and department heads) have the potential to fulfill the role of external coaches. The findings lay bare a variety of barriers, both big and small, that currently prevent these two education system actors from providing substantive instructional support to teachers—the most significant being a lack of time and capacity to act as “critical friends” to teachers. The report concludes by posing questions to consider for further research and in future experimental intervention design.

## Executive Summary

External instructional coaching (instructional coaching conducted by coaches who are external to the formal education system) has been shown to be a critical component of improved learning outcomes in South Africa. However, such coaching is generally expensive and difficult to implement at scale. This study examines whether actors that already exist within the country’s formal education system (namely, subject advisors and department heads) have the potential to effectively deliver instructional coaching.

Drawing on interviews and observations conducted with stakeholders in government schools where external coaching interventions are currently underway or have recently occurred, the report analyzes the types of support provided to teachers by department heads (DHs), subject advisors (SAs), and external coaches; these actors’ relationships with one another and with teachers; and their perceptions of the support being provided. The findings suggest that DHs and SAs face a variety of both small and large barriers that external coaches do not in delivering effective instructional support to teachers. These barriers include the following:

- **Time and resource constraints:** Both SAs and DHs face significant limitations to their time and resources. While external coaches are hired to focus exclusively on working with teachers, SAs and DHs have many other duties to fulfill, as well as logistical barriers that can impede their ability to spend time in classrooms observing teachers.
- **Limited training:** The external coaches interviewed and observed for this study demonstrated consistent actions and language, technical expertise, and confidence, suggesting that they have undergone intensive, targeted training. Coaches discussed their roles similarly, used the same tools to guide lesson observations, and used similar affective language when discussing coaching. In contrast, SAs and DHs demonstrated wide variability in their descriptions of their roles, the tools they use in their work with teachers, and in the words and phrases employed to describe their work. Further, while some SAs and DHs discussed providing coaching, their descriptions show a lack of understanding of what coaching entails. This suggests that SAs and DHs lack the deep training required to effectively support teachers to improve instructional practices. This lack of training currently represents a significant barrier for SAs and DHs. These findings demonstrate that the barriers for SAs and DHs to take on instructional coaching are not simply rooted in resource constraints, but also represent a skills and knowledge gap.
- **Power and authority barriers:** SAs in particular hold power and authority that external coaches do not have. While this can be an advantage for SAs in terms of enforcing compliance, it can also inhibit their ability to build trust and relationships with teachers. SAs may be able to learn valuable lessons around earned authority from the external coaches who operate in their schools. However, even if SAs behave differently, they may still face barriers due to teachers’ perceptions of them as inspectors and evaluators.

In conclusion, the study provides evidence that under the current state of affairs, external coaches are the only actors currently equipped to provide effective instructional coaching to teachers in South Africa’s government schools. While there may be an expectation on paper that this kind of coaching is part of SAs’ and DHs’ roles, this does not happen in practice; neither SAs nor DHs have the time or capacity to provide teachers with the kind of attention that successful coaching requires. As a result, successful coaching has thus far been conducted by actors external to the formal system, who are hired to focus on teacher support. For SAs or DHs to deliver effective instructional coaching, system-wide changes that address both small and significant barriers would be required.

## Introduction and Background

In recent years, multiple studies have demonstrated the efficacy, and even necessity, of instructional coaching for intervention success; for example, in South Africa's Early Grade Reading Study I (EGRS I), schools that received instructional coaching visits in addition to basic training and resources showed significantly higher gains than schools that received the same basic training and resources but no instructional coaching. There is a significant amount of evidence showing that coaching “works” to improve learning outcomes in the South African context (Cilliers et al., 2020; Fleisch & Alsofrom, 2022). A major question facing South Africa and education systems around the world is how to effectively strengthen institutional capacity to ensure that teachers receive ongoing support and coaching – a key factor for instructional improvement.

The present study was commissioned to further understand the nuances of instructional coaching in South Africa. In the South African education system, there are two formal roles that are designated to provide support to teachers: subject advisors (SAs) and department heads (DHs). SAs are employed by the Department of Basic Education (DBE) and work at the provincial and district levels. They are assigned to specific schools and are expected to visit these schools—though the frequency with which these visits must occur is unclear. Meanwhile, DHs are teachers who are promoted to the DH post within a specific school. DHs are school-based, and meant to work with the teachers in their school.

This study aims to offer insight into how these different roles—SAs, DHs, and external coaches—function in practice in relation to teachers and teaching; this knowledge is critical for making good decisions about how to build the South African education system's capacity to provide support to teachers.

### External Coaches

External coaches (sometimes referred to as instructional coaches, literacy coaches, or simply coaches) are actors from outside of the education system who help teachers improve their instructional practices in their classrooms. In the South African context, coaches' primary responsibility is generally to work with teachers for the duration of a given structured pedagogical program (SPP) to help teachers implement the program materials properly.

As noted above, coaches in the South African educational context refer to individuals who are external to schools and to the education system. They are usually hired by external service providers for the duration of an intervention to provide targeted, one-on-one, in-classroom support for teachers. As Fleisch and Alsofrom (2022, p. 6) explain, the purpose of instructional coaching is “to support teachers to implement the core methodologies in the daily lesson plans provided, thereby improving [teachers'] content knowledge, pedagogical techniques, and ultimately, helping to build teachers' professional confidence.” In other words, coaches are focused primarily on helping and supporting teachers. Coaches' job expectation tends to be centered around meeting required coaching dosages—that is, spending significant time with teachers in their classrooms—rather than, for example, fulfilling administrative tasks. Low coach-to-teacher ratios aim to make intensive, regular support for all of coaches' allocated teachers possible. Service providers are responsible both for hiring qualified coaches and for providing the training necessary for coaches to effectively assist teachers. Consequently, coaches tend to receive intensive training at the outset of an intervention, in addition to ongoing training throughout the intervention's duration.

While external coaching has shown to positively impact learning outcomes, it can be expensive due to the need for relatively low coach-to-teacher ratios, high coaching dosages, and intensive coach training—meaning that it can be impractical and unsustainable for system-wide change. Within the South African education system, other actors—namely SAs and DHs—serve in roles that aim to support teachers. However, SAs' and DHs' roles are widely understudied, leaving unanswered questions about their everyday work and their impact on teachers and teaching practices. This study explores whether these actors, who are conveniently situated within the system, could potentially take on the functions of coaching.

### Subject Advisors (SAs)

According to South Africa's DBE (2013, p. 11), SAs, sometimes called Senior Education Specialists (SES) or Curriculum Implementers (CIs), are “specialist office-based educators in a district office or circuit office whose function is to facilitate curriculum implementation and improve the environment and process of learning and teaching by visiting schools, consulting with and advising school principals and teachers on curriculum matters.” The DBE's *Subject Advisor Profiling Study* supports this, stating that “the chief function of Subject Advisors is to monitor and support curriculum delivery in order to ensure that quality teaching and learning takes place in schools” (2020, p. 1).

However, despite attempts by the Education Labour Relations Council to outline key performance areas for SAs in 2017<sup>1</sup>, there is still some ambiguity around SAs' formal and informal roles and responsibilities. Government documents generally agree that SAs are meant to "to support curriculum implementation and ensure that quality teaching and learning takes place in schools" (DBE, 2020, p. 24). However, the lack of a defined job description has resulted in SAs taking on a wide range of responsibilities. As a result, it is more difficult to clearly define what SAs do on a daily basis than it is to define what external coaches do. Previous studies have found that SAs are responsible for tasks ranging from instructional leadership to providing career guidance to learners (Dilotsohle, Smit, & Vreken, 2001; Mbanjwa, 2014; Tatana, 2014). Further, because provincial departments of education have some flexibility with regard to SAs' roles, the specific functions of SAs may vary slightly based on location and context.

As Metcalfe (2023) notes, "There are many anomalies in the alignment of provincial allocation of subject advisors to national policy. Some of these are definitional and this has bedevilled comparative analysis" (pp 9-10). In other words, expectations aren't necessarily consistent or clear around SAs' roles, including the frequency with which they are expected to provide on-site support to schools and teachers. This ambiguity and inconsistency provides significant definitional challenges.

In addition to role ambiguity, there is limited research on SAs' ability to support teachers in changing instructional practices and improving learning outcomes. While there have been interventions, such as the Primary School Reading Improvement Programme, that have delivered ongoing training for SAs to help them better assist teachers with implementing daily lesson plans in their classrooms, research into whether SAs are able to support teachers in improving learning outcomes is largely absent from the literature.

## Department Heads (DHs)

DHs, meanwhile, are meant to serve as a source of internal support or supervision for teachers within the school setting. According to the DBE, a DH's role is "to engage in class teaching, be responsible for the effective functioning of the department and organise relevant/related extra-curricular activities so as to ensure that the subject, learning area or phase and the education of learners is promoted in a proper manner" (1999, p. 10). In the Foundation Phase, DHs are also class teachers who have a 97% teaching load. The Foundation Phase Curriculum Annual Policy Statement (CAPS) specifies a 23 hour timetable for Grade 1-2 and 25 hour timetable for Grade 3 per week (p. 11). Accordingly, DHs are expected to teach 19.55 hours per week (based on the Grade 1-2 timetable) leaving them with 3.45 hours per week for their supervisory tasks. However, this time may be dependent on the availability of another adult to monitor DHs' classrooms as they attend to other tasks.

In addition to the 3% of teaching time, DHs, like all FP teachers, are expected to be present at school for another 2 hours per day (7 hours in total with a timetable that specifies teaching for up to 5 hours per day). While this potentially represents an additional 10 hours of worktime per week, DHs must also spend time preparing lessons, attending staff meetings, and taking care of other administrative tasks. In addition (though perhaps obviously) in the time before and after school, teachers cannot observe teachers teaching in their classrooms.

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1 The document outlines the following KPAs for SESs (SAs):

- a. Provide professional guidance through the implementation of systems and structures that allow for effective management. These will include the following:
  - Conduct regular on-site support visits to teachers in schools; and
  - Represent the district at other relevant forums; and
  - Coordinate and manage district priorities and projects; and
  - Ensure effective and efficient utilisation of resources and information services; and
  - Work collaboratively with schools to improve learner performance.
- b. Facilitate correct interpretation and ensure effective planning, implementation, monitoring and evaluation of policies;
- c. Conduct analysis of data collected in order to inform and improve teaching and learning;
- d. Facilitate workshops and training sessions on behalf of their sections/area of responsibility;
- e. Collate and compile reports based on visits and provide feedback to learning institutions;
- f. Report to line managers regarding interventions and progress at learning schools; and any other reasonable function assigned by the employer within the job function

### **Additional KPAs: SES: Curriculum Support and Delivery (Subject Advisors all phases)**

- a. Monitor and support the implementation of the curriculum in the relevant subject;
- b. Ensure that educators have all the requisite curriculum and assessment documents for the subject;
- c. Guide and support educators in effectively delivering the curriculum in the classroom;
- d. Support teachers in strengthening their content knowledge and organising relevant/related co-curricular activities;
- e. Moderate school based assessment;
- f. Keep, analyse and interpret examination results (assessment of learners' and educators' progress) and draw up intervention strategies to provide professional guidance to educators/ learners;
- g. Have a thorough knowledge and understanding of the relevant subject/phase Curriculum Assessment Policy Statements (CAPs); and
- h. Build CAPs knowledge and understanding among educators and keep files/records regularly updated with recent and relevant subject policy documents and ensure that educators in schools have the same. (ELRC, 2017, pp. 16-18).

In their study of DHs in the Jika iMfundo project, Mthiyane, Naidoo, and Bertram (2019) note that DHs' responsibilities are often more comprehensive than those outlined by the Jika iMfundo intervention documents. The authors find that in practice and as noted in other government documents, DHs are meant to be "class teachers, are responsible for the allocation of teaching loads, and undertake general school administrative tasks such as monitoring book stocks, collecting monies, and managing staff welfare as well as secretarial, and timetabling duties," and argue that it is critical to acknowledge their "heavy workloads and overwhelming administrative responsibilities" (Mthiyane, Naidoo, & Bertram, 2019, pp. 58, 56) when considering asking DHs to take on additional duties. While there are cases of DHs taking on additional duties, as per the South African literature. The following section outlines the study's methodology. It describes the piloting process and how the findings from the pilot cycle of the study impacted instrument development and fieldworker recruitment and training processes; outlines the reliability, validity, and trustworthiness measures taken for this study; and notes the study's limitations. The analysis and findings section then provides an in-depth analysis of the interview and observational data. Finally, the conclusion and recommendations section outlines the main lessons learned, as well as questions that merit further research.

## Research Questions

The goal of this report is to explore the nature of the monitoring and support roles and relationships that currently exist in South African government schools where external interventions are underway or have recently occurred. Ultimately, it is crucial to understand the similarities and differences between existing roles to grasp whether the substantive support that external coaches provide to teachers can be replicated through other actors in the system—namely, SAs and DHs.

Without detailed, qualitative information about how the various actors currently function, it is impossible to know how the roles of SAs and DHs would need to adapt to provide a coaching function.

In particular, this study seeks to answer the following research questions:

1. What is the nature of SAs' support to schools and teachers when a coach is external? When a coach is a DH?<sup>2</sup>
2. What is the nature of DHs' support to and their relationship with teachers and SAs? (What does this three-way relationship look like?)
3. What are the perceptions of teachers, coaches, DHs, and SAs around mechanisms of support?
4. Can SAs be effective instructional coaches? (If so, what would need to change for SAs to take on this role? What are the barriers and enabling factors?)

These primary research questions, along with supporting sub-questions, are utilized to organize the *Analysis and Findings* section of this report.

## Literature Review

Instructional coaching has become a popular intervention strategy for helping teachers shift their instructional practices in the hopes of improving learning outcomes. There is a growing body of empirical evidence demonstrating that instructional coaching can be effective in positively impacting learning outcomes, both in high-income contexts (see Kraft, Blazar, & Hogan, 2018; Cohen, Krishnamachari, & Wong, 2021; Hofmeyr, 2019) and low- and middle-income contexts (see Piper et al., 2018; Majerowicz & Montero, 2018; Castro, Glewwe, & Montero, 2019). Coaching is largely utilized as an alternative (or addition) to one-off training intervention models, which have often been shown to be ineffective in improving learning outcomes. That said, coaching is a relatively costly undertaking and may not be a sustainable or scalable solution for system-wide change (Jacob & McGovern, 2015). In the South African context, there are other actors within the formal education system (namely, SAs and DHs) who could potentially fulfill the task of instructional coaching, thus sparing the need to hire external coaches. The question posed by this study is, can these education system actors effectively fill the functions of instructional coaching? To answer this question, it is critical to understand what coaching entails and the elements that make it successful.

City et al. (2009, p. 49) argue that many large-scale reform efforts fail because "[education] systems' capacity to deliver the knowledge and skill required to improve instruction at the classroom level falls short of what is needed to make the strategy work," noting that this is often caused by an underestimation "of how complex the actual work of teaching is." Instructional coaching can help remedy this problem by helping teachers implement new practices and sustain them long enough to see their (positive) impacts on learning (Guskey, 1986, 2002; Piper, 2016). Hofmeyr (2019, p. 24) notes that "teacher-led professional learning communities might work in high-functioning systems where teachers can share best practice but are unlikely to be

<sup>2</sup> In the Early Grade Reading Programme (EGRP), DHs have been trained as coaches in 40 schools. As of 2023, these DH coaches had received one year of training. Three such DH coaches were interviewed as part of this study.



effective in developing countries with low-functioning systems, which have few examples of good practice that can be shared.” This is supported by evidence that interventions utilizing peer coaching, such as the one studied by Thijs and van den Berg (2002) in Botswana, are less effective than instructional coaching models. In other words, more practical, intensive, and expert-led instructional conversations are arguably necessary to build pedagogical repertoires and improve teaching practices in lower-capacity education systems.

There is no universally accepted definition of what coaching entails. A multitude of definitions can be found in the literature (see Hofmeyr, 2019). In their widely cited meta-analysis of coaching research, Kraft, Blazar, and Hogan (2018, p. 9) characterize coaching as a process “where instructional experts work with teachers to discuss classroom practice in a way that is individualized ..., intensive ..., sustained ..., context-specific ... [and] focused.” Meanwhile, de Haan (2008, p. 5) argues that “the aim of coaching is to improve the coachees’ performance by discussing their relationship to certain experiences and issues,” and Bresser and Wilson (2010, p. 10) argue that coaching is about “empowering people by facilitating self-directed learning, personal growth and improved performance.” Kraft, Blazar, and Hogan (2018) note that the wide variability in the outcomes of coaching interventions is likely due, at least partially, to the inconsistency in what may be considered “coaching.” According to the *Rapid Review of Coaching Programmes and Materials across South Africa*, while many South African organizations utilize “coaching,” there is little consistency in terms of approach, engagement, recruitment, and conditions of service, and “the change theory developed within different service providers impacts on the way the coaching model is interpreted and then implemented” (Marneweck, 2019, p. 7). Given these variable definitions of coaching, it is not difficult to see why the evidence from coaching interventions may be widely variable; in addition, it is difficult to understand from a definition alone whether other actors may serve as “coaches.”

Importantly, in a broad Global South context, coaching tends to be one component of a multi-component SPP (see Piper et al., 2018; Fleisch, 2016; Eble et al., 2021). SPPs have emerged as a significant category of educational interventions throughout the Global South (Conn, 2014; Glewwe & Muralidharan, 2015; Murnane & Ganimian, 2014; Snilstveit et al., 2016; Evans & Popova, 2016) and have shown to be effective in improving educational outcomes, especially compared to other types of interventions. A number of systematic reviews of educational research (Conn, 2014; Glewwe & Muralidharan, 2015; Murnane & Ganimian, 2014; Snilstveit et al., 2016; Evans & Popova, 2016) have found that SPPs are the most successful interventions in improving learning outcomes. In the South African SPP context, coaching is generally one element of a “triple cocktail” that includes teaching materials, resources for learners, and regular coaching (Fleisch, 2016).

When noting that coaching in low- and middle-income countries tends to be part of a larger pedagogical program, Evans (2022) poses the question, “After all, what are you going to coach the teachers to do?” Coaching in this context is aimed not at improving or refining existing practices but at helping teachers develop new practices altogether. Piper and Zuilkowski (2015) argue that in Kenya, outdated and ineffective teaching practices, such as teacher lecturing and whole-class repetition, underlie learner underachievement. The authors assert that “in order to shift toward research-based pedagogy in this challenging context, teachers need additional pedagogical support” (Piper & Zuilkowski, 2015, p. 174). Fleisch (2016) and Banerji and Chavan (2016) similarly cite rote and didactic learning methodologies—such as choral recitation and copying from the board—as the standard in South African and Indian classrooms, respectively, and as being largely responsible for poor learning outcomes. Banerji (2015, p. 30) argues that there is a need for “disruptive pedagogic intervention” in order to move beyond the narrow set of ineffective practices that currently characterize teaching in these contexts. Structured pedagogical interventions are designed to disrupt the status quo by introducing new teaching methodologies into classrooms and providing the necessary support for the change process. In these SPPs, coaching can be seen as the catalyst to teachers enacting new methodologies and effectively utilizing other educational materials provided, which are necessary but insufficient drivers of change on their own (Hofmeyr, 2019; Piper et al., 2018; Snilstveit et al., 2016; Sabarwal, Evans, & Marshak, 2014).

Change is, of course, a complex process—not a straightforward one. In order to effectively catalyze teacher change, coaches may be required to fill a number of different roles. Walpole and Blamey (2008, p. 222) explain that effective literacy coaches “wear many hats.” In their study of Malaysian instructional coaches, Kho, Saeed, and Mohamed (2019) found that coaches were “implementers, advocates and educators” who shifted their role depending on teacher readiness and attitudes. L’Allier, Elish-Piper, and Bean (2010, p. 549) argue that coaching should be both “intentional and opportunistic” and that coaches should be “deliberate but flexible” in their work with teachers. Coaches must not only have expertise in teaching practices and support the implementation of improved instructional regimes but also be skilled relationship builders, be excellent communicators, and have high emotional intelligence (Knight, 2007; L’Allier, Elish-Piper, & Bean, 2010; Avant, 2012; Lowenhaupt, McKinney, & Reeves, 2014; Alsofrom, 2018).

In their discussion of change at the “instructional core,” City et al. (2009, p. 8) argue that interventionists should operate with the assumption that “most educators are working, for better or for worse, at, or very near, the limit of their existing knowledge and skill.” Put another way, it is critical to operate with the assumption that teachers are working to the best of their ability within the constraints of their pedagogical knowledge base. With this assumption in mind, it is clear that teacher learning—not incentivizing—is needed for system reform. Piper and Korda’s (2011) finding in Liberia—that pedagogical and material inputs improved outcomes while accountability inputs did not—helps illustrate this point. The authors argue that “what differentiated the light and full treatment schools [where classroom-based coaching was provided to teachers] in their gains were the techniques themselves. In other words, there does not appear to have been some hidden knowledge in how to teach reading that was lying dormant in teachers and could be accessed by simple accountability measures. Those help, but the real gains came from a program that taught teachers new techniques and provided significant support for the implementation of those new techniques in the classroom” (Piper & Korda, 2011, p. 21). Further, in their analysis, the authors maintain that in order to be effective, interventions must focus on teaching teachers particular skills—not on building general pedagogical knowledge. Coaches, then, need to be able to teach new, specific, and targeted teaching techniques and provide significant support for implementation.

Multiple researchers note the necessity of training and ongoing professional development for coaches (Knight, 2007; Rainville & Jones, 2008; Chauvin & Theodore, 2013). Poglinco and Bach (2004, p. 400) emphasize that “being an effective classroom teacher is no guarantee that one will be an effective coach.” In other words, while successful coaching may help teachers change and improve their instructional practices, being an excellent practitioner of these practices isn’t enough—coaching requires a unique knowledge and skillset. While pedagogical expertise (or in the South African context, expertise in the relevant SPP methodologies) is critical for introducing and supporting new teaching techniques, this may not be enough to effect change.

Knight (2007, p. 33) argues that “coaching is about building relationships with teachers as much as it is about instruction. The heart of relationships is emotional connection.” Vanderburg and Stephens (2010, p. 154), in a study exploring what teachers appreciated about their coaches, found that with the support of a coach, “teachers felt empowered to try new teaching practices” and “comfortable enough to risk trying new strategies.” Avant (2012, p. 101) found that coaches “realize that building trust with teachers and forming relationships with them are prerequisites to coaching.” Similarly, in the South African context, Alsofrom (2018) found that an emotional connection is a prerequisite for effective coaching because, in the context of a teacher-coach relationship, real and meaningful learning (and not simply mechanical implementation) can take place. Relatedly, there is evidence that “evaluator” is one role that coaches should not fill if they wish for their coaching to be effective (L’Allier, Elish-Piper, & Bean, 2010). As Hofmeyr (2019, p. 22) asserts, “most importantly, coaching should not be linked to the evaluation of teachers’ performance.” The role of an effective coach is arguably incompatible with the role of an evaluator because the latter inhibits the establishment of the emotional connections that are a prerequisite for real and meaningful learning to occur (Alsofrom, 2018).

This combination of knowledge and skills needed for effective coaching is crucial to thinking about how other actors in the system may or may not be suited to take on coaching duties. For example, in the DBE’s *Subject Advisor Profiling Study* (2020, p. 52), the authors assert that “the central role of a Subject Advisor is to monitor and support curriculum delivery in order to ensure that quality teaching and learning takes place in schools.” This definition—which juxtaposes the terms “monitor” and “support”—presents a tension that exists when considering the possibility of SAs serving as instructional coaches. While the report states that “many officials (11) interviewed in this study were keenly aware of the importance of building relationships of trust with school staff, and recognized that even monitoring tasks must be approached as a supportive exercise, and not as an act of policing” (DBE, 2020, p. 56), the dual roles of monitoring and support that SAs are expected to provide may be incompatible with (or at least present a major barrier to) the types of supportive relationships and confidentiality needed for effective coaching to take place, as noted above. This may be compounded by the fact that SAs are often perceived by teachers to be inspectors and fault-finders. Alsofrom (2018) found that the teachers in her study expressed fear and apprehension around SAs coming into their classrooms—even if the teachers did not have personally negative experiences with SAs. The DBE’s *Subject Advisor Profiling Study* (2020, p. 56) found that “some officials (3) mentioned the negative connotations associated with ‘inspectors,’ which stems from the apartheid era. These outdated views can sometimes reportedly influence how advisors are viewed and treated in schools: ‘Because it’s all about perception,’ ‘Why we there?’ ‘Oh they coming to check up on us.’” There may be a number of real and perceived barriers, then, for SAs to successfully act as coaches.

While SAs’ formal position in the education system makes them, in certain ways, obvious alternatives to external coaches, other contextual realities, such as resource constraints (DBE, 2020) and constraints in SAs’ knowledge and skills (Chetty et al., 2022), challenge whether this is possible in practice. Further exploration is needed to understand the existing barriers that might prevent SAs from delivering effective coaching and how these barriers could be overcome. The present study seeks to explore not only whether SAs can fulfill coaching roles but whether DHs may take on coaching roles as well. While there is little evidence about DHs taking on additional roles as coaches, there is some research around DHs’ roles in South African schools. Tapala, van Niekerk, and Mentz (2020), for example, interviewed DHs regarding their roles and found that DHs saw themselves as

responsible for monitoring, motivating, role modeling, commitment, communication, goal setting, accountability, and personnel management. This list represents a wide variety of roles, meaning that DHs may potentially face some of the same barriers as SAs. Additionally, a study by Thaba-Nkadimene and Ndikameng (2020) examined factors that impeded DHs from executing their instructional leadership roles in Limpopo primary schools. The study found that DHs faced a number of challenges, such as a lack of training, inadequate resources, and limited support from school leadership, that negatively impacted their ability to effectively provide support to teachers.

There are instances where actors within the formal education system have overcome barriers to provide effective support to teachers. In their study of the Kenyan Primary Math and Reading (PRIMR) Initiative, Piper and Zuilkowski (2015) explore how roles within the education system were successfully altered to provide meaningful support (i.e., coaching) to teachers. In the PRIMR intervention, tutors from teacher advisory centers (TACs), employed through the Ministry of Education, were trained and incentivized to visit teachers in their classrooms. This resulted in TAC tutors visiting classrooms and observing lessons significantly more than in control schools, where classroom visits were nearly nonexistent. By incentivizing tutors to make consistent visits to classrooms and to interact with teachers around instructional issues, the PRIMR intervention fundamentally changed interactions between teachers and TAC tutors (Piper, Zuilkowski, & Mugenda, 2014; Piper & Zuilkowski, 2015). The findings from Kenya “suggest that it is possible to provide instructional support through existing personnel” (Piper & Zuilkowski, 2015, p. 180) if the role of these personnel is refocused toward actual classroom contact time and away from other activities. The example of Tusome provides evidence more administrative roles can potentially be effectively adapted and repurposed toward coaching.

The present study aims to fill some of the key gaps in the literature—namely with regard to the definitions and functions of coaches in the context of South African schools; the current roles of coaches, SAs, and DHs, as well as their respective barriers to success; and the substantive differences in the perceptions of the individuals serving in these roles—in order to cultivate a deeper understanding of the changes that would need to occur for actors within the education system to take on coaching in a meaningful and effective way.

## Methodology

This section begins by discussing the study’s data sampling methodology. Next, it outlines the process of data collection. Then, the processes of instrument development and fieldworker recruitment and training are outlined. It then briefly discusses data storage and security, as well as data analysis. Finally, it discusses the measures taken to ensure the reliability, validity, and trustworthiness of the data, in addition to noting the study’s limitations.

### Data Sampling

Due to the nature of the research design and objectives, the main data collection for this study occurred in a limited number of schools—15 total. Purposive sampling was used to select five schools in each of the three iterations of the Early Grade Reading Study (EGRS I, EGRS II, and the Early Grade Reading Programme (EGRP)) (see Table 1). This method of sampling was used because of the need to select schools that had received in-person coaching support through the early grade reading interventions.

Intervention name	EarlyGradeReadingStudyI (EGRS I)	EarlyGradeReadingStudyII (EGRS II)	EarlyGradeReadingProgramme (EGRP)
Province	North West	Mpumalanga	North West
Districts	DrKennethKaundaDistrict& NgakaModiriMolemaDistrict	Gert Sibande District & Ehlanzeni District	DrRuthSegomotsiMompotiDistrict
Implementation period	2015–2017	2017–2019	2021–2023
Coaching delivery	On-site coaching	On-siteandvirtualcoaching	On-site coaching
Intervention grades	Foundationphase(grades1–3)	Foundationphase(grades1–3)	Foundation phase (grades 1–3)
School-basedstaffwho received coaching	Teachers	Teachers	TeachersandDepartmentHeads

The sample sizes were fixed prior to data collection and were based on the resources and time available, as well as the study’s objectives. The EGRP schools involved in the study were selected differently from the EGRS I and II schools because the EGRP is still underway; the EGRP schools were selected based on the coach visitation schedules so that coaches could be observed during their scheduled coaching visits.

## Data Collection

In order to answer the four research questions, the research team collected data from the following categories of respondents:

- **EGRP external coaches** – Interviews and observations were conducted with EGRP coaches. As per the project design of the EGRP, some of these coaches are responsible for coaching teachers directly, and others are responsible for training DHs to conduct coaching in their schools.
- **EGRP SAs** – Interviews and observations were conducted with SAs who work in schools where the EGRP is currently being implemented.
- **EGRP DHs** – Interviews and observations were conducted with DHs in EGRP schools where DHs are currently receiving training to conduct coaching in their schools.
- **EGRP teachers** – Interviews (and not observations) were conducted with selected teachers in EGRP schools. Teachers were not prioritized for observations, as the focus of these interviews was around their perceptions of support systems.
- **External coaches and SAs involved in past interventions (EGRS I and EGRS II)** – Coaches and SAs involved in EGRS I and EGRS II were interviewed to provide more data. Many of these interviews were conducted virtually.

Annex 1 provides details about each intervention’s project design and coaching dosage, which may be helpful for more deeply understanding the findings of this report.

Prior to the administration of the main data collection, all project stakeholders were informed about this research through the DBE. This outreach included contacting relevant SAs, coaches, and DHs, as well as the principals of intervention schools. The DBE sampled 56 project stakeholders who could be potential respondents. A further 11 possible respondents were identified through referral and engagements with respondents. Ultimately, Decipher Data successfully collected data from 49 of the 67 selected participants.

Main data collection was administered between October 17 and November 4, 2022. Fieldworkers were sent to the field intermittently based on the availability of respondents. Not all the needed data were collected during this initial period, and a second round of data collection was conducted during February 2023. This round was solely focused on completing the DH observations, and it concluded on February 14, 2023.

**Figure 1. Summary of respondents’ designations**

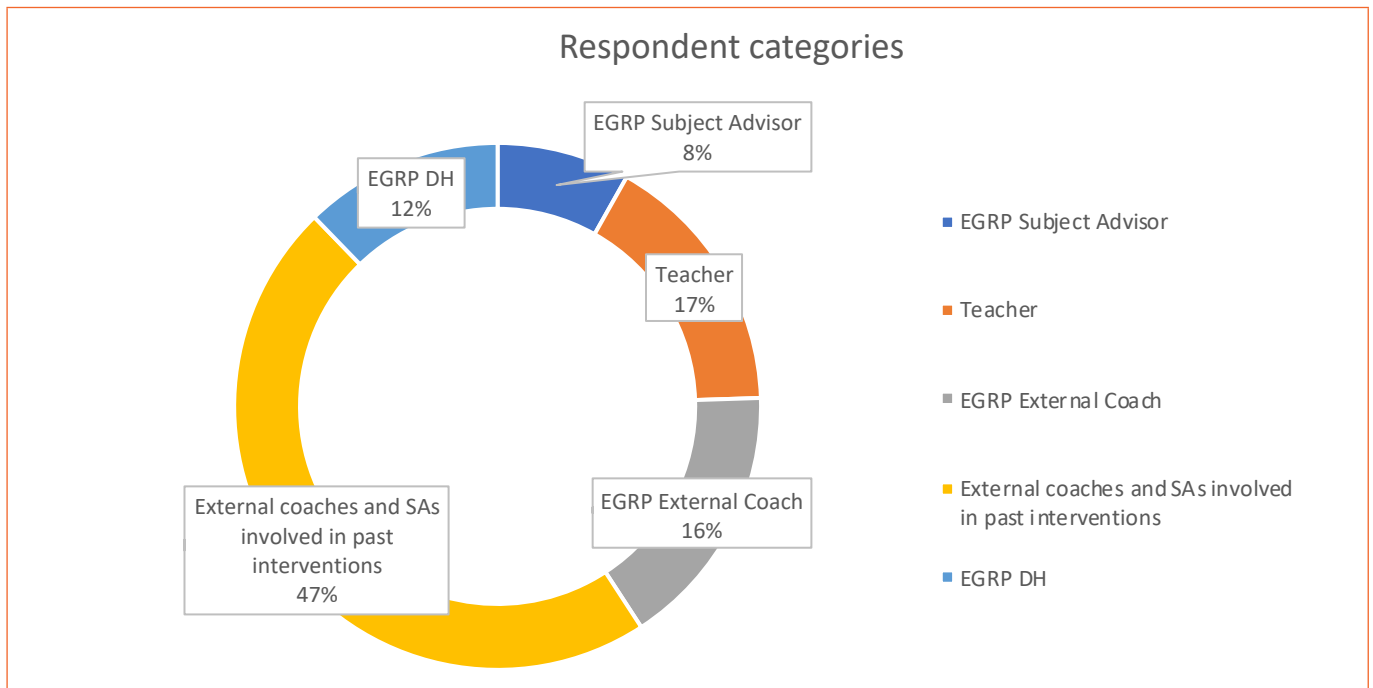
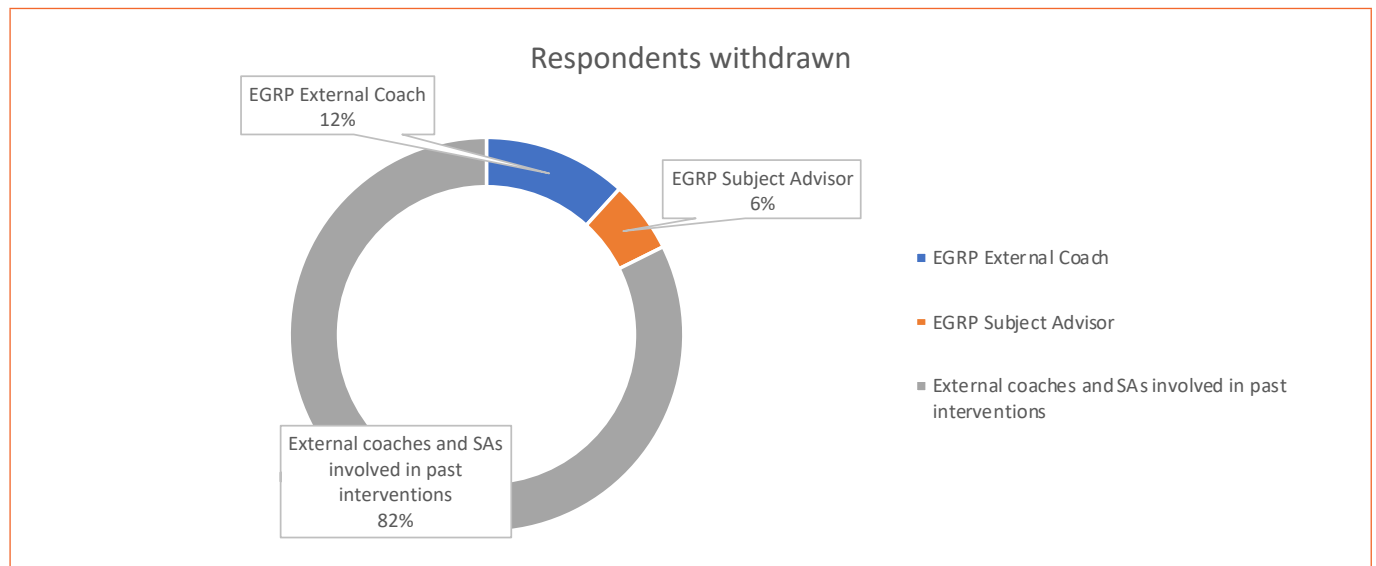


Figure 1 provides a breakdown of the study’s respondents. The respondents were purposively sampled to allow for the data to include various experiences and methods from different interventions.

**Figure 2. Summary of respondents who withdrew from the study**



**Figure 3. Study response rate**

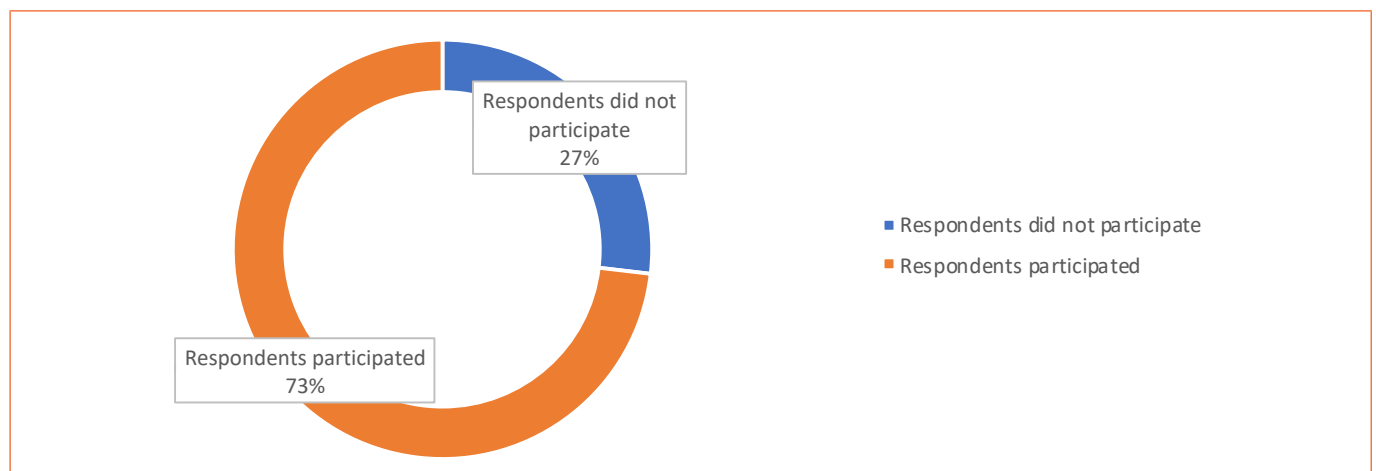


Figure 2 outlines the respondents who withdrew from the study. The most common reason for withdrawal was that respondents could not be reached. Several of the selected respondents did not answer the phone in the multiple attempts made to contact them; in other cases, the calls were blocked or went straight to voicemail. Other participants withdrew from the study because they were either too busy to participate or felt they could not adequately answer questions about the intervention. Figure 3 provides the study's overall response rate.

### Instrument Development

The data collection instruments for this study were developed collaboratively and were revised and refined after the piloting phase of the project. The initial set of instruments was developed by studying similar instruments used in studies from past interventions and compiling draft instruments that aligned to the study's draft set of research questions. The instruments went through an initial mapping and review process to ensure that all interview and observation questions were aligned to the research questions and that all the research questions were represented in the instruments' questions.

The fieldworkers in the piloting phase were former teachers, SAs, and external coaches who were familiar with the South African school environment and interventions. During the pilot fieldworker training, the initial set of instruments was reviewed by fieldworkers, who were given the opportunity to suggest amendments to the tools before piloting in schools commenced. As a result, the instruments in the piloting phase reflected input both from the study's Project Management Team (PMT) and from fieldworkers.

The pilot testing process with the initial set of instruments was administered by three fieldworkers who visited six schools over a three-day period. Daily check-ins were held during the pilot testing to discuss performance. In addition, each instrument contained a reflection section that asked fieldworkers to provide written feedback on the use of the instruments and reflections from their experience in the field.

Data collected through the piloting phase were analyzed and reviewed. This allowed the PMT to reflect on the tools' and fieldworkers' effectiveness in gathering the desired information. Based on the data collected, the PMT refined and clarified the research questions and discussed changes to the instruments. The instruments were subsequently revised and shortened to align with the refined research questions and to gather higher-quality, more relevant data during the main data collection cycle.

The final set of instruments utilized for the main data collection cycle consisted of the following:

- SA interview instrument
- SA observation instrument
- External coach interview instrument
- External coach observation instrument
- DH (coach) interview instrument
- DH (coach) observation instrument
- Teacher interview instrument

### Fieldworker Recruitment and Training

Two sets of fieldworkers were recruited to carry out the interviews and observations for this study. The first cohort of fieldworkers conducted data collection during the pilot testing cycle, while the second cohort collected data during the main data collection cycle.

Following the pilot testing, the PMT reviewed the performance of the fieldworkers based on the quality of data collected. The team determined that while the fieldworkers in the pilot testing cycle had valuable knowledge and skills as education and coaching practitioners, the main data collection cycle would require fieldworkers with stronger qualitative research skills in order to be able to conduct more effective and detailed probing.

As a result, the PMT decided to administer a second round of recruiting. New job advertisements were written outlining the required skills for the second cohort of fieldworkers. The PMT utilized word of mouth and DBE recruitment platforms to recruit seven new fieldworkers.

These seven fieldworkers participated in a four-day training in October 2023. This training began with introductory sessions that explored the definition and principles of qualitative research. Next, the workshop facilitator used a question-by-question approach to review each of the instruments. This approach was used to ensure that participants developed a shared understanding of the purpose of each question, had the opportunity to think through some of the expected responses and potential follow-up questions, and became familiar with the administration protocol. After this review of the instruments, trainees were divided into pairs to practice administering them. Importantly, feedback sessions were incorporated throughout the four-day training in order to address trainees' questions, troubleshoot specific issues, and prepare trainees for potential scenarios that they might encounter in the field.

A significant part of the training was also dedicated to the use of Otter.ai, the transcription software trialed in the pilot phase and which would be utilized in the main data collection cycle as well. Through interactive, role-playing activities, trainees gained an understanding of how to use the software and of the software's performance in various contexts (e.g., interviewing someone who is soft-spoken, interviewing people with different accents, etc.).

After the conclusion of the training, the PMT appointed six of the seven trainees to participate in the main data collection cycle. These fieldworkers' profiles are detailed in Table 2.

**Table 2. Fieldworker profiles (main data collection phase)**

Gender	Highest educational qualification	Previous data collection experience	Language(s)
F	Currently pursuing PhD in sociology	Fieldwork experience (qualitative interviews and observations)	English, Tshivenda, isiZulu, Sepedi, Setswana
F	Currently pursuing doctor of commerce in human resource management	Fieldwork experience (qualitative interviews and observations); qualitative research activities for EGRS	English, Setswana
F	Currently pursuing PhD in sociology	Fieldwork experience (qualitative interviews and observations)	English, isiXhosa, Siswati, isiNdebele, Setswana, Sepedi, Sesotho
F	MEd in education leadership and policy	Fieldwork experience (qualitative interviews and observations); developing and administering qualitative methodologies	English, understands Afrikaans
F	Currently pursuing PhD in sociology	Fieldwork experience (qualitative interviews and observations); qualitative research activities EGRS	English, Setswana, Isizulu
F	BA (Hons) in education	Fieldwork experience (qualitative interviews and observations); qualitative research activities for EGRS	English, Isizulu, Siswati, isiXhosa, Setswana

## Data Storage and Security

This study used paper-based and electronic forms of data capturing:

- **Paper-based instruments** – All observations were conducted using paper-based instruments. Fieldworkers were asked to scan their completed instruments and email them to Decipher Data. The physical copies were then returned to Decipher Data headquarters for archiving. Interviews were also conducted using paper-based tools. However, because the interviews were audio-recorded, the responses were not captured on paper.
- **Electronic instruments** – While paper-based instruments were used as the initial capturing instrument for observations, fieldworkers recorded all of their notes in Microsoft Word versions after each observation. These documents were uploaded onto Google Drive and Dropbox for the PMT to access. All electronic data were accessible only by the PMT.
- **Electronic data collection software** – The Otter.ai recording and transcription software was used in the field for interviews. The software, which has a secure cloud-based storage facility, also served as a data collection platform for the recorded and transcribed interviews. Profiles were created for each fieldworker, who then shared their recordings and edited transcriptions with the PMT. All recordings and transcriptions were stored in the Otter.ai cloud. These recordings and transcriptions were accessible only by the fieldworkers and the PMT, who was responsible for quality control and the review of the transcriptions.

## Data Analysis

Only data from the main data collection cycle, and not the piloting cycle, were referenced for the findings presented in this report. Data analysis began with researchers from the PMT doing an initial read-through of the data from the interviews and the observations and compiling lists of key themes. The researchers then met to discuss and verify findings. Thereafter, data were categorized and compiled into Excel spreadsheets; this included raw data (quotations) and researchers' reflections. From there, an additional meeting was conducted to discuss the themes in more detail and to review the evidence (raw data). Tallies were then provided as evidence for each of the identified themes, as were tallies to account for divergent data. Finally, the data were categorized according to the study's research questions and sub-questions; this provided an additional opportunity to review the data and make connections and linkages between the previously identified themes. This iterative data analysis process helped eliminate the risk of researcher bias and ensure that the findings were rooted in a comprehensive understanding of the data, thereby increasing accuracy.

## Reliability, Validity, and Trustworthiness

Several steps were taken to ensure the reliability, validity, and trustworthiness of the study's findings.

First, the piloting cycle was an important step in enhancing the reliability, validity, and trustworthiness of the research. This process allowed researchers to identify and address potential sources of inconsistency and error before conducting the main data collection. It also helped ensure time to clarify the research questions and revise the instruments, helped ensure that fieldworkers with appropriate experience were hired, and helped inform training content and procedures.

Beyond the pilot, for all data collected in the project, a detailed log of the research was maintained, and recordings and verbatim transcriptions were acquired for all interviews. In addition, the data from the interview transcriptions were organized into a spreadsheet, allowing the data to be grouped by question and compared side by side. These techniques not only enhanced the validity of the study but also increased its reliability by ensuring that other researchers could look at the data collected and confirm or reject the theories presented. In addition, the study's research log and standardized tools ensured that another research team could carry out the same study and obtain similar results.

Additionally, fieldworkers were trained on research methods and data collection techniques to guarantee consistency in data collection. This comprehensive training ensured that all fieldworkers had a common understanding of qualitative research principles and good practices, including how to ask questions and record responses. The training was delivered through interactive and role-play focused sessions and included the use of Otter.ai transcription software. The training, practice with software, and practice with editing transcriptions all helped contribute to achieving researcher reliability, as the fieldworkers were able to see how the software performed in different scenarios, including with respondents with varying accents and respondents who spoke softly. Further, the use of transcription software and Google Drive also helped ensure that data were accurately recorded and stored in a consistent manner. The use of these strategies contributed to the reliability of the findings as the data can be reviewed and replicated in a consistent and standardised manner.

In addition to ensuring reliability, the verbatim transcriptions of the interviews and detailed note-taking during all observations helped enhance the study's validity. Again, data analysis was a collaborative and iterative process. Data were examined multiple times. Throughout the data analysis process, multiple researchers engaged with the raw data and noted themes individually. Then, researchers discussed the themes noted individually, looking for overlap and consensus. This happened not once but twice. This cyclical process helped reduce instances of individual error and bias. Further, themes and assertions were backed with tallies and triangulation; counting was used to confirm themes, and divergent evidence was noted and reported on in the findings section, along with the evidence for the themes. Moreover, the data from the interviews and observations served as multiple sources; as the analysis was conducted, themes were confirmed (or not) by cross-checking across data sources and PMT members' independent analyses.

Finally, the inclusion of contradictory evidence and perspectives in the analysis helps increase the trustworthiness of the study by presenting a full, nuanced picture of the research and allowing for multiple perspectives to be considered.

## Limitations

The limitations of this study are in line with limitations of qualitative research in general. First, while steps were taken to ensure the reliability, validity, and trustworthiness of the findings, it is always possible that researchers might draw on their own preconceived ideas and experiences when interpreting data and drawing conclusions. It is therefore possible that the researchers' perspectives played a role in the data analysis conducted for this study. Qualitative data analysis is complex and subjective; while efforts were made to describe conclusions drawn in the data analysis process, there may be subjective disagreements in the way that certain data have been organized, categorized, or interpreted. In addition, the sample size of this study—especially for certain stakeholder groups, such as the DH group—is quite small. The findings of this study can provide suggestions to consider but should not be widely generalized, especially to other contexts.



## Analysis and Findings

### Research Question 1

The first research question and the overarching question of the study was, **What is the nature of SAs' support to schools and teachers when a coach is external? When a coach is a DH?**

Insight into this overarching question is organized into six sub-questions, the first two of which are:<sup>3</sup>

- **How many visits are expected to each school by SAs? How many actually happen?**
- **How many visits are expected to individual classrooms by SAs? How many actually happen?**

Exploring the frequency of SAs' school visits and the challenges to conducting them successfully helps answer questions around whether SAs might be able to act as effective instructional coaches and what kind of formal and informal changes might need to occur to the SA role for this to be possible in practice. In order to fully understand the implications of the data collected from SAs, data around the frequency and challenges of school visits reported by external coaches are included in this section for comparison.

#### **Frequency**

There is no clarity to the frequency with which SAs are expected to conduct school or classroom visits. The Key Performance Areas (KPA) outlined in the Education Labour Relations Council's (ELRC) collective agreement 4 on the job descriptions for office-based educators (2017b) simply state that Senior Education Specialists (SES), more commonly referred to as SAs, must "conduct regular on-site support visits to teachers in schools" (pg. 16). What is considered "regular" seems to be open to interpretation – the number of expected or required visits to schools and teachers is not specified. In addition, "on-site" is also quite an ambiguous term – which can be interpreted as school-based, but not necessarily classroom-based visits. Indeed, it is not entirely clear whether SAs are formally allowed into classrooms at all; although there is not an outright or explicit ban on SAs entering classrooms, they are also not specified among those actors allowed to enter classrooms to conduct classroom observations per PAM (2022)<sup>4</sup>. Additionally, a 2009 NEEDU report explains that SADTU has not agreed to individual classroom observations or supervision by SAs "on grounds that teachers of poor schools struggle with difficult teaching conditions and demanding school policies which are not backed up with sufficient support and resources from the education department" (NEEDU, 2009, pg. 28). In summary, classroom observations are a both a complex and contested space.

In addition to the ambiguity surrounding the expected frequency of classroom visits, large ratios make consistent classroom visits impractical. As noted in the DBE's *Subject Advisor Profiling Study* (2020), individual SAs in South Africa may support anywhere from fewer than 25 schools to more than 500 schools (although this upper limit is rare) and the number of schools allocated to SAs varies by province and district. Despite some variation across the country, the report asserts that "many district offices are understaffed, and the number of schools allocated to advisors is mostly too high for them to provide a quality service" (DBE, 2020, pp. 68, 70). Further, 78% (284) of the SAs surveyed in the report noted that they have never visited some of their assigned schools – let alone all of the teachers they are expected to support inside those schools.

Spaull and Taylor (2022) calculated the average number of Foundation Phase (FP) teachers per SA for EFAL and Mathematics by province, and similarly found that these ratios varied quite drastically. While in the Western Cape, the average number of teachers per SA was 225, in Kwa-Zulu Natal, the average was 1,547. In five out of nine South African provinces (Eastern Cape, Gauteng, Mpumalanga, Limpopo and Kwa-Zulu Natal) the average number of FP teachers to a single SA was over 400. Spaull (2023) argues that:

*"Apart from the fact that Subject Advisers typically have inadequate knowledge of how to teach reading themselves – typically scoring 50% on tests measuring this (Chetty et al. 2022, pg.75) – there are also simply too few of them to realistically train teachers they are responsible for...These ratios make meaningful training and support impossible. By contrast, the heavy dose interventions that have shown improvements in reading outcomes (EGRS and Funda Wande) have a ratio of one coach to approximately 33 teachers."*

(Spaull, 2023, pg. 15)

<sup>3</sup> Some of the most interesting themes that emerged in this qualitative study span multiple research questions, making it challenging to strictly align the data to specific research questions. Additionally, in certain instances, comparative data provide a more textured and contextualized answer to the research question(s) at hand.

<sup>4</sup> The PAM (2022) document states that both SMT members (including DHs) and circuit managers can conduct classroom observations but does not stipulate that SAs can conduct these observations. The document outlines regulations on when and how often classroom observations can happen (2-3 times per year.) and includes specific protocols for both pre and post observations. The emphasis of classroom observations is on evaluation for QMS performance appraisal; the purpose of the outlined visits is not on providing ongoing support to teachers.

Similarly, according to the Department of Basic Education's (2019) Coaching Norms and Standards document, the maximum recommended ratio for coaching interventions is 1:30. This stipulated maximum ratio for coaches (while a maximum ratio simply does not exist for SAs) is a major contradiction if the DBE reasonably expects SAs to take on a coaching function. Even the lowest ratio of 1:225 that exists for SAs and FP teachers in the Western Cape is still likely to be unreasonably high and represents a major barrier to SAs completing sufficiently "regular" visits to impact change in the schools they are expected to support.

The high ratio that SAs face are reflected in the data collected in the present study. One SA interviewed for the present study explained, "Something that you need to remember is that we have very, very low human resource[s] at present. There are only five subject advisors. We've got more than 400 schools." Another said, "Each and every month, you are expected to monitor the maximum of 16 to 17 schools." SAs in the present study reported being responsible for anywhere between 60 and 170 schools each, with some sites requiring a significant amount of travel. In other words, SAs tend to have large school loads to support and, in turn, large amounts of teachers to support as well—making it difficult for them to visit all of their allocated schools, let alone all of the teachers they are meant to support within those schools.

In a recent report on the constraints of effective curriculum support for South Africa's teachers, Metcalfe (2023) notes that in the provinces with the highest SA to teacher ratios mentioned above (Eastern Cape, Gauteng, Mpumalanga, Limpopo, and KwaZulu-Natal), there are also a significant amount of vacant Senior Education Specialist (SES)<sup>5</sup> posts. Metcalfe calculates that in Limpopo for example, 60% of the approved posts for curriculum support personnel remained vacant in 2022 – meaning that only 40% of the expected workforce for teacher support in that province was in place. In Mpumalanga, vacancies were at 48%; in KZN, 47% post remained vacant; in the Eastern Cape, 54% were open; while in Gauteng this figure was just 9%. Spaul and Nkata (2022) note that provincial departments of education, have been instituting hiring freezes for middle management posts to save money while still ensuring the system runs at a basic level. Though the report specifically examines DHs and Deputy Principals, the same austerity measures may be at the root of the number of vacant SA posts. Given the high vacancy rates discussed, the problem of unreasonably high ratios is not likely to be easily resolved by simply adding more posts.

Metcalfe (2023) notes that provinces have made a variety of adaptations to manage difficulties and constraints in providing support to schools and teachers. For example, the Western Cape has both the lowest SA to teacher ratio (again, in the FP, one SA supports 225 teachers on average) and the lowest vacancy rate (at just 2% of approved posts). In the Western Cape, FP SAs cover all four subjects (EFAL, HL, Mathematics, and Life Skills) rather than being subject-specific, and "therefore the available resources are deployed effectively to minimise the SES: school ratio" (Metcalfe, 2023, pg. 13). While this is a measure that could be adopted in other provinces, the Western Cape is currently the only province to have shifted to generalized support in the FP. While there may be concerns regarding language-specific support for schools, there is evidence that with the exception of Gauteng, communities across South Africa generally tend to share a common HL (see, for example: Mohohlwane et al, forthcoming). As a result, this may not be as significant an issue as some may expect it to be. Because it is not legislated that SAs need to be subject specific, generalizing these posts may be worth other provinces considering. However, this is not a magic solution as the ratios are still likely to remain unreasonably high for regular classroom support to occur for every teacher.

On the other hand, external coaches reported not only on the number of schools supported but on the number of teachers supported as well. The range of schools and teachers supported varied. While some of the coaches interviewed supported just six or seven schools, others reported supporting as many as 36 schools. It is notable that coaches seemed to have a good idea (without needing to reference any documents) of the numbers of teachers they were responsible for supporting. The range here was also quite large—with most coaches (12 out of 25 interviewed) supporting anywhere from 20 to 45 teachers (or DHs for the EGRP schools where DHs received training to conduct coaching). There were some coaches—5 out of 25—who reported supporting more than 70 teachers. Additionally, there was one virtual coach interviewed for the study who supported 50 schools and 82 teachers. It is important to remember when reviewing these coaching numbers that the coaches interviewed for this study worked on a variety of different projects. Different coaching interventions may have had different design features, resulting in different coach-to-teacher ratio requirements, as well as different dosage expectations.

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5 Metcalfe (2023) notes that "It must be noted that the general use of the term 'subject advisors' is used, incorrectly, to capture the work of several 'curriculum support and delivery' roles at district level" and uses the following terms instead of the generic term 'SA':

- Chief Education Specialist (CES): Curriculum Support and Delivery
- Deputy Chief Education Specialist (DCES): Curriculum Support and Delivery
- Senior Education Specialists (SES): Curriculum Support and Delivery

While only half of the teachers reported ever receiving a classroom visit from an SA, all nine of the SAs interviewed reported that they visit classrooms when they go to schools—“every time,” “always,” and “definitely.” One SA even noted, “Yes, I go to the classroom. I don’t go to the office. I just go to the classroom because I want to see my learners reading.” However, this is not quite what was noted during the observations of SAs. In the observations that were carried out in the four EGRP schools, two of the four SAs were observed going into classrooms. One of these two SAs was observed demonstrating to the teacher how to teach group guided reading. The other SA was seen quietly observing the lesson and the classroom layout. Additionally, the SA observation tool had three sections: one for lesson observation, one for school visit, and one for induction. Field workers who observed SAs primarily ticked the “school visit” section to describe the work of SAs and not the “lesson observation” section—which is what coaches mainly were observed doing when at the schools. Perhaps SAs would like to be conducting lesson observations and have the intention to do so, but the realities of time and teacher load prevent them from doing this.

When asked, six out of nine (66%) of the SAs reported that they do not manage to visit all of the schools and teachers they plan to visit in a month, with the remaining three out of nine responding that they only “sometimes” manage to complete their planned visits. This is in line with the findings of the DBE’s *Subject Advisor Profiling Study*, in which 65% of SAs reported that they were unable to visit all their assigned schools because they are “simply assigned too many schools” (2020, p. 69). Like SAs, coaches also noted challenges in successfully completing all of their planned school visits. When asked about whether they complete all of their expected visits to schools each month, 22 of 24 coaches provided answers to this question; of these, eight coaches stated that they were not always able to conduct all of their planned school visits each month, and three said that they were able to complete their planned visits “most of the time”—so not always. However, 11 coaches reported that they were able to conduct their school visits as planned. Interestingly, even the coaches who reported conducting all their school visits did report some challenges to visiting their schools.

The information given by teachers during their interviews was reflective of what SAs and coaches stated in terms of the difference in frequency of classroom visits. Out of the eight teachers interviewed in this study, three said they had received a classroom visit by an SA, while four (50%) said they had never received a classroom visit. The final teacher reported that her first classroom visit was that day, the day of the interview. In contrast, six out of the eight (75%) teachers reported that their coaches had visited them many times—too many times to count easily. One teacher explained, jokingly, “Yho! I can’t remember but every time she’s here. Let me say in a month maybe she came thrice or four times. Ebile re thlole re mo omany [We are always shouting at her] ... Re re o tla gantsi mo go rena [that she’s here too often].” Of the other two teachers, one was in an EGRP school where DHs received training to conduct coaching, and she reported that she hadn’t received any coaching visits (noting that her coach had spent time with the DH and did not visit first grade teachers), and the other stated that she had received just two classroom visits from a coach.

### **Challenges**

SAs and coaches alike cited challenges to visiting schools, but the challenges they reported were different. While both groups cited unplanned meetings and workshops as a challenge, they discussed this aspect differently. SAs commonly cited unplanned meetings as a challenge; six out of nine of the SAs interviewed noted that being called to “pop-up” meetings and provincial workshops prevented them from completing their school visits. One SA explained that SAs are able to complete their visits “depending on the deviation from the province, but if there is no deviation, then we manage,” and another said, similarly, that “sometimes it [is] impossible because we’ll be called for a meeting or other activities.” Unplanned meetings and workshops were also the most cited challenge by coaches, with 9 out of the 24 coaches interviewed noting this challenge.

However, whereas SAs were often called to attend meetings at the last minute, coaches were not. Coaches discussed the challenge of *teachers* being called to impromptu meetings and workshops. One coach explained, “Sometimes I come to a school, I find situations beyond my control that I am not in the position to see the teachers that I was supposed to do things. Like there’ll be a meeting. You have scheduled to see three teachers, but you are unable to see them because they need to go before school [is] out.” Another coach explained, “Some [teachers] attend training, departmental programs, so ... I can’t say I reach all of them in a month.” Some coaches discussed moving their visits around and rescheduling in the event of such meetings to try to ensure that the disruptions did not impact their ability to support teachers. This challenge described here suggests that if SAs were to take on a coaching role, provincial and district offices would need to prioritize SAs supporting teachers and ensure that SAs are not frequently pulled away from schools.

For SAs, the issue of transportation also posed a significant challenge, with six out of nine (66%) SAs in the present study citing transportation issues as a major barrier to visiting schools. SAs raised the issue of transportation in response to several of the study's interview questions, identifying it as an impediment to effectively doing their jobs. This confirms a key finding from the DBE's (2020) Subject Advisor Profiling Study: that SAs need more resources, particularly when it comes to the issue of transport, which was identified as the greatest resource constraint facing SAs (DBE, 2020). According to the survey results in the DBE (2020) report, 36% of survey respondents noted that they always have access to a departmental vehicle, 35% reported intermittent access, while 29% of respondents indicated that a departmental vehicle was simply unavailable (DBE, 2020, p. 75).

Even for those SAs who always had access to a department vehicle (like 80% of respondents from the Western Cape), the fact that these vehicles are generally shared presents additional barriers to visiting all the required schools and spending sufficient time at each school, particularly in more rural contexts where schools are generally quite far from each other.

The DBE Report cites two Western Cape SESs (SAs), who summarize the challenges of shared (pooled) cars in depth:

*"If like geographically, if you are the furthest school, obviously you take basically control of the car for that day. So by the time I drop off two other colleagues, I only get to the school at half past 10, so I can only visit maybe one teacher or two maximum, because then I need to go pick people up again, you know what I mean. So if you're the driver, you actually have less time at your school... the first person that gets dropped obviously has more time so she can maybe fit in three classes" (SES, WC).*

*"Obviously it was a huge adjustment working now here in the Cape and obviously it's an assigned car and then we are 3 assigned to a car, so someone that's in Khayelitsha, and I wanted to go to the Strand, it's difficult because maybe we need to adjust the schools accordingly, and sometimes the schools that are close to them are not the schools that I actually want to visit... so we need to be constantly reshuffling schools. So at times you may visit a school that you don't necessarily want to see because of the transport. It's a huge issue and I'm still trying to it sort out" (SES, WC)*

(DBE, 2020, p. 76)

Specific issues related to transportation may differ by province, or even by district. While some provincial departments use "pooled" cars, other provincial departments or district offices may reimburse SAs for petrol costs – especially to try to manage shortfalls in the number of cars available for SAs. The DBE (2020) report notes that one coping mechanism for SAs is to use their own private vehicles, and attempt to claim back travel costs. This strategy was noted by an SA interviewed for the present study, who explained that, "Many times I'm using my own transport and I'm not getting paid for that. I'm just digging deeper into my pockets to subsidize the department and I've been doing that ever since I joined advisory." The DBE (2020) report notes that, while some SAs may use their private vehicles to visit schools, this is particularly unfavourable for SAs in rural contexts, due to the poor conditions of roads there.

Metcalf (2023) notes that while policy guidelines for SAs seem to assume an unrestricted budget for travel costs, the reality is different:

*"All provinces implement a policy of restriction on kilometres that can be claimed for travel to schools. This cannot be a common policy across all provinces, or within provinces across districts. An SES serving Zululand or uMkhanyakude will travel considerably more than an SES in uMlazi – or more strikingly – in high density metropolitan areas such as Johannesburg Central or Tshwane North. The impact of these restrictions creates another level of inequality in the resourcing and therefore the support provided to teachers in rural areas." s*

(Metcalf, 2023, pg. 8)

The issue of remote schools and potential kilometer restrictions represents an additional challenge to ensuring school visits for South Africa's most rural schools.

While transport represented a major barrier for SAs to conducting regular school visits, coaches did not cite transportation concerns, except for one coach who noted that limited *teacher* transportation made it difficult to give struggling teachers extra support after school. In other words, while transportation issues significantly impacted SAs, they did not seem to affect coaches. Indeed, one of the teachers interviewed noted that her coach supported her best because "the coach visits us when he promises to visit, he fulfills his promise. He's always there for me." Of course, the work of coaching requires presence in schools and regular interactions between coaches and teachers; presence in schools requires adequate transport. In order to ensure that coaches could fulfill their promise to visit schools and teachers, the EGRP project spent approximately R53,000 each month from January – June 2023 for eight coaches transport costs. This figure includes the cost of petrol, maintenance (wheel repairs, etc.), and tracking devices on each of the coaches' vehicles.

There seems to be quite a clear difference between coaches' relationship to resources and SAs' relationship to resources. This likely stems from different accountability relationships related to resourcing that exist for coaches, who work for externally funded interventions, versus SAs, who work for the government. Coaches' expenses—and especially their transportation costs—are likely to be considered a fundamental part of the coaching job and thus covered by the budget of interventions that include coaching. Transportation costs, for example, would generally make up a budget line item in a funded intervention, and all work-related transportation would usually be covered by the implementing organization.

For example, in the EGRP, coaches are not hired unless they have a driver's license. Each coach is allocated a car, and there is a budget within the project for car maintenance. The implementing organization provides coaches with a preloaded petrol card, which they use to buy petrol for their school visits. In past projects such as the EGRS II, coaches were hired only if they could provide their own cars. Coaches then submitted monthly travel logs for reimbursement at the standard South African Revenue Services rates. Because this rate covers vehicle wear and tear, coaches were expected to keep their cars in good working condition and to make a plan if they were having an issue with their vehicle. In this way, transportation is considered a basic and fundamental part of coaches' job; neither funders nor service providers would consider a lack of transportation to be an acceptable excuse for a coach to not meet their dosage requirements.

In contrast, SAs working for the government are not in the same position. In the North West Province, for example, where the EGRP is being conducted, SAs are generally allocated "pooled" cars to conduct their visits. This means that SAs are expected to share cars with other district officials. On top of this, there is a significant shortage of pooled cars available; an estimate from 2019 showed that for 781 staff members in the North West, 173 vehicles were allocated and there was a shortage of 134 vehicles (DBE, 2022). These numbers show that even if all vehicles were properly allocated, SAs would still face challenges related to the need to carpool or share vehicles noted above. The same accountability relationship that exists for externally funded interventions doesn't exist in this case—it is challenging to hold the government accountable for not providing its own staff members with the transportation needed to conduct school visits.

While incentives tied to the frequency and distribution of school visits were successful in helping refocus Curriculum Support Officers (CSOs) in Kenya towards conducting school and teacher support (Piper et al., 2018), because of the significant barriers that exist in terms of human capacity and transportation shortfalls, incentives are unlikely to have the same impact in the South African context. The main challenges to getting SAs into schools do not seem to be issues of motivation, but rather issues of concrete numbers (of people, cars).

Given the nature of the challenges in the South African context, these resource-related barriers would likely need to be addressed before a system of incentives could make a difference.

To compound the issues of personnel and vehicle shortages, there is currently no standardized school assessment data available, and thus, no objective measure with which to gauge which schools (or teachers) need more support than others. While there are major challenges that are beyond the scope of this study to implementing standardized school assessments, this kind of data could help ensure that SAs could focus limited resources on the schools that need support most; in its absence, SAs in the current system are simply unable to provide the kind of breadth and depth of support schools need – no matter how much they might wish to.

The other main challenges brought up by coaches seem to be challenges that SAs should also face but which SAs did not raise. For example, community strikes and protests were a commonly cited challenge among coaches but were mentioned by only one of the SAs. Six coaches (25%) mentioned that strikes and protests made visiting schools difficult. It seems that this could be a common challenge for both SAs and coaches, so it is interesting that it came up as a significant concern for coaches but not for SAs. Perhaps because transportation is already such a pressing issue for SAs, the issue of strikes and protests seem less significant for them. Similarly, the issue of teacher absenteeism, including sick teachers, was mentioned by 7 out of 24 coaches as a challenge to conducting school visits effectively. However, this was not a challenge raised by any of the SAs interviewed. This suggests, perhaps, that SAs may be more focused on *getting* to schools and not as much on the challenges that may arise once at those schools. Whereas coaches must ensure visits to all of their teachers, SAs are likely not as concerned if one or two teachers are missing when they conduct a school visit. In addition, SAs may not be as impacted by teachers being called out to meetings if SAs are in those same meetings or are even the people calling the meetings.

On the whole, SAs seemed to be more focused on the challenges related to their own jobs, whereas coaches were more likely to discuss barriers beyond their control. Further, while the challenges aired by SAs tended to be ones that prevented them from getting to schools to conduct visits, coaches' challenges focused both on getting to schools and on conducting visits with individual teachers. One coach even noted that one visit to a school isn't always enough—in bigger schools, if there is not enough time to see all the teachers in one visit, the coach must conduct visits over multiple days in order to see everyone. A different coach helped clarify that “we count our visits per term. So, we try very hard to make sure that we visit—each teacher gets the correct quota of visits ... Because the quota is important. How much time you spend with a teacher will [relate] to how much time the teacher makes progress. So, the less you spend, the less the progress. The more you spend, the more the progress.”

The only other challenge noted by SAs was a lack of cellular data and airtime, inhibiting effective communication between SAs and their schools. Though this was mentioned by only one SA, this challenge may be related to transportation in that it seems to represent a financial constraint, which will be discussed in more depth later in this report. Other, less significant challenges noted by coaches were funerals and memorial services, school activities, and generic “unforeseen circumstances.”

Overall, the challenges revealed by SAs that prevent them from getting to schools and that give them minimal time to work with teachers are likely to greatly impact the nature of the support they are able to provide to schools and teachers. At a basic level, the challenges related to transportation interact with high SA-to-school ratios, and where schools are located. Exploring these challenges, especially as compared to the challenges identified by coaches, reveals some nuanced yet significant differences between SAs and coaches.

- **What is the content of SAs' visits to schools? (What is expected to happen during those visits? What actually happens during those visits? How does this compare to coaches' visits?)**

In order to gain a deeper understanding of the content of SAs' and coaches' school and classroom visits, and to understand some of the substantive differences between SAs and coaches, both groups were asked to define their roles. This question allowed SAs and coaches to describe the content of their work in their own words. The findings show some of the key differences in the nature and quality of support provided by SAs versus that provided by coaches. The results in this section are somewhat expected based on the literature: coaches seem more focused on providing substantive support to the teachers they work with, while SAs' roles are less defined and more varied.

### ***Coaching roles***

The analysis of the data revealed a few key instances where coaches seem to have consensus around certain terms or repeatedly and consistently utilize certain words and terminology. In some instances, coaches' responses almost seemed practiced or rehearsed. More likely, however, is that this shared language is reflective of consistent and substantive training (in the EGRP, for example, coaches are trained on a termly basis and then conduct teacher trainings based on their own training), a clear job description and communication around job function and expectations, and, potentially, a clearly stated definition or theory of what good coaching entails.

When asked about what it would take for DHs to become coaches (discussed in further detail later in this report), 16 out of the 24 coaches interviewed (66%) referenced the training that it takes to become a coach. As one coach argued, “Coaching is a skill, which [you have] to be trained on. We had to go through training first. And we had to submit portfolios of evidence before we embarked on actual training. And even after the training, it takes a while before you get used to what is expected of a coach, what is your role.” Another explained that “to become coaches ... you must have [a] certificate. [DHs] should know what coaching is all about.” A third coach opined that “well, they would obviously need training, because to be a coach is not as simple as just knowing the methodology and things like that. So, I think they would have to have like a coaching course that they would need to go on to. They obviously need to know the program very, very well.” An additional (17th) coach did not specifically mention training but noted that for DHs to become coaches, “you [would] start with [DHs] knowing what the role of the coach is and viewing themselves also as coaches to the teachers that they are managing.” Taken together, these quotations help paint a picture of the kinds of training and mindset shifts that coaches go through to carry out their roles. This sentiment is aligned with the literature, which highlights the need for coaches to have specialized knowledge, knowledge of teaching and learning strategies and techniques, excellent communication skills, and high emotional intelligence and relationship building skills (L'Allier, Elish-Piper, & Bean, 2010; Avant, 2012); further, multiple researchers note the necessity of intensive training and ongoing professional development for coaches (Knight, 2007; Rainville & Jones, 2008; Chauvin & Theodore, 2013).

One example of the common coaching language is the usage of the term “critical friend” throughout the coaching interviews, and the definitions given about what being a critical friend means. Interestingly, Knight (2007, p. 26), a widely cited source in the instructional coaching literature, argues that “coaches are most effective when they act as critical friends, simultaneously providing support and empowering teachers to see where they can improve”; while coaches may not be able to name this source, they certainly seem to embrace its term and definition. Ten coaches (42%) used this term at some point in their interview to discuss the role of a coach; in contrast, the term did not appear in any of the SA interviews.

The usage of the term “critical friend” provides significant information about how coaches view their roles in schools. From the definitions given, being a critical friend requires building relationships, being “approachable,” helping teachers improve, and respecting, not judging, teachers. A few quotations illustrate these points well. One coach, a former SA, noted, “[Coaching] is different from what I’ve been doing previously, when I was still in the Department of Education. Because the focus now is saying, you don’t just check, check, check what the teachers are doing. You motivate and coach them and then you support them as well where they are having gaps. Basically, you take them by the hand and [say], ‘We are critical friends and we are in this together. So, if you need any help, I’m accessible at any time.’” Another coach similarly stated that as a coach, “You have to be a critical friend to the teachers. So, for me, it’s very much about building a very positive relationship, so that the teachers see you more as a support system, and not as a monitor or an inspector.” A third coach stated that “as a coach you need to be a critical friend to the teachers. When you go to school, they must not be stressed that my coach is coming, they must be happy that my coach is coming to help me.” Another coach explained, “You have to be a critical friend ... you become a coach—not an inspector or a subject advisor ... to build a relationship with [them], so that it’s easier for them to identify their needs where they need to be supported on ... So you assist them in totality like—you are there to just motivate them ... You treat them like you are colleagues, you are friends but in a critical way that when you give them feedback it develops them.” These quotations illustrate the supportive and friendly way coaches feel they must approach and work with teachers.

Further, although just 10 out of 24 coaches used the term “critical friend,” the descriptions coaches gave of their roles largely reflected the definition of what it means to be a critical friend—indeed, most coaches (18 out of 24, or 75%) described their role as supporting teachers, indicating a general consensus that their primary role is to be supportive of teachers. Coaches identified various ways that they do this, including by equipping teachers with knowledge and helping them understand the provided lesson plans, supporting teachers “as humans” emotionally and psychologically (not simply professionally), and making teachers’ lives easier. Out of the six coaches who did not explicitly discuss support, five discussed leadership, motivating teachers, providing teachers with strategies and advice, and building relationships—all activities aligned to support. These varied roles within the supportive coaching role reflect Walpole and Blamey’s (2008, p. 222) assertion that effective literacy coaches “wear many hats,” as well as their finding that coaches serve in both mentor and director roles—for example, they may mentor as teachers and modelers, and direct as curriculum managers and trainers. Similarly, in their study of Malaysian instructional coaches, Kho, Saeed, and Mohamed (2019) found that coaches were “implementers, advocates and educators,” shifting their role based on teacher readiness and attitudes. The descriptions provided by coaches in this study, however, are more affective. It seems that in the case of South African coaches, a word like “counselor,” “motivator,” or “advisor” might need to be added to this description.

While one coach used the word “monitoring” to describe her role as a coach, she subsequently described a supportive relationship (and not a monitoring or evaluative one), saying, “The role of the coach is to train, to develop and to monitor the teachers. It is my duty as a coach, firstly to be friends with—to be a critical friend with my teachers so that when they are experiencing a problem, they don’t have to fear [that] ... how am I going to approach this woman? ... You have to build up a relationship whereby the teacher will be able to trust you, trusting in totality to the point that she should be able to tell you everything in terms of teaching and learning. Because really, you have to be—the correct word there is you *have*—I have to be approachable. So that the teacher should not fear me but they should trust me, because we are friends.” From this quotation, it would seem that this coach is focused on supporting—not monitoring—her teachers.

The teachers interviewed felt that their coaches were friendly and treated them kindly—as coaches described above. As previously noted, six of the eight teachers interviewed had regular interactions with an external coach; of these teachers, 100% used positive adjectives to describe their relationship with their coach: “My coach, as I said, when he comes to my class he is cooperative, calm, and gentle”; “She’s a nice person, and she always appreciates what we are doing ... She encourages us to do more”; “She’s very calm. She’s very cool. She’s very supportive”; “It is always nice having [the coach] around, because he’s a man who was very insightful, very patient, and very helpful. So having him it’s always a pleasure and one comes out knowing more and being more encouraged”; “My coach is friendly. She’s so friendly. We ask her everything. We aren’t afraid of her. During training, we ask anything, even if she is at the classroom. I don’t have a problem with my coach. She’s friendly. She speaks to us nicely.”

Ten coaches (42%) explicitly stated that building relationships was part of their role, with three coaches discussing trust building. This involved connecting with teachers emotionally and also building relationships not just with teachers but with other stakeholders as well. One of the coaches explained that “[as] a coach also, you know, you involve stakeholders. I mean, teachers are not isolated in a school. The [DH], there’s a principal, there are subject advisors. So, you form a relationship with all those people. Because if you focus only on the teacher ... the [DH] will say ‘Uh uh, I don’t want my teachers doing that’—you see what I’m trying to say? So you’re working backwards. So whatever you’re doing, you carry along, you inform.” In this way, building relationships is an activity that is supportive of teachers by helping them succeed and making their lives easier. This perhaps mirrors Anderson, Feldman, and Minstrell’s (2014, p. 15) observation that coaches serve as “trust builders” within school environments because they “seem to foster trustworthy environments as they create the context for risk taking, being vulnerable as they carry out trustworthy actions.” It is unclear how much coaches serve as “trust builders” in the context of South African schools and how this may impact the quality or nature of support given by SAs in schools where coaching occurs. Training and conducting school-based workshops were other significantly cited components of the coaching role. Ten coaches identified training as part of their role, while eight identified school-based support—i.e., support to address common challenges observed throughout the day—as part of their work. Other noted functions of the coaching role were observing lessons (9 out of 24), identifying gaps and challenges (or strengths and weaknesses) (8 out of 24), providing lesson demonstrations (7 out of 24), giving feedback or reflecting with the teacher (5 out of 24), sharing strategies or best practices with teachers (6 out of 24), and supporting and listening to reading (5 out of 24). Coaches noted that they needed to motivate teachers or help build teachers’ confidence (6 out of 24). All of these functions notably revolve around issues of instruction.

### **Subject advisor roles**

When SAs were asked to define their roles, their answers were varied—a stark contrast to the shared understanding of coaching that seems to exist among coaches. While many SAs used the word “support” to discuss their role as SAs, this word tended to accompany other words: “monitoring and support” (3 out of 9), “coaching and support” (2 out of 9), and “monitoring, coaching, and support” (2 out of 9). “Accountability” was an additional word introduced by three of the SAs—a word that was never used by coaches. SAs also “wear many hats,” but those hats do not seem to be the same hats that coaches wear. The descriptions of “support” and the actual activities that SAs described doing in schools varied; sometimes, SAs used the word “support” but then described activities that do not align with how coaches, for example, seemed to define support. For instance, one SA stated that their role is to “support only.” This SA stated that during school visits, she usually requests teacher files, checks whether teacher planning correlates with learner books, checks activities in learner books, observes classrooms, demonstrates lessons when needed, writes reports, and gives feedback to teachers. Interestingly, the same SA also noted that “sometimes we have to go to two schools. So if you go to two schools, you will have to sample educators or sometimes you’ll say ‘No, I will not go into the classroom because there’s no time. I have to only check on the planning and then learners’ activities and go.” This makes it difficult to gain a clear picture of the content of this SA’s school visits and whether she is able to support instruction.

Interestingly, as noted above, four out of the nine SAs interviewed (44%) used the word “coaching” to describe their role. One of the SAs interviewed explained, “I was coaching, supporting and monitoring. I was doing them all ... As a subject advisor, I was responsible for all those schools. So, when I found the mistakes, I had to rectify them. Sometimes I called them for workshops. That is why I am saying I was doing them all. When you call them for workshops, you are coaching, isn’t [it] so? And then when you go to school, you’re supporting and monitoring the implementation.” From this description, it seems that what this SA views as coaching is different from the textured, affective description characteristic of coaches’ responses, which often included the term “critical friend.” This SA seems to define coaching as holding a workshop to rectify teachers’ mistakes. There is no discussion of building relationships, motivating teachers, building confidence, building trust, or, importantly, supporting issues of instruction. Based on the language used in the SA interviews generally, SAs largely do not view their role as one of building relationships or forging emotional connections. While this may seem insignificant, it may represent a major barrier that would have to be overcome if SAs were to take on a coaching role, for there is ample evidence that effective coaching is rooted in emotions<sup>6</sup> (Knight, 2007; Vanderburg & Stephens, 2010; Avant, 2012; Alsofrom, 2018).

6 While there are models from other countries of actors taking on dual roles that combine evaluation and support, there are also examples like Zambia where coaching is conducted through a school-based peer coaching model. The Ministry of Education, Republic of Zambia (2014) handbook for enriching teaching through school-based coaching cites the need to build trusting relationships through a model of coaching that is non-evaluative. Another potential option in a South African context is to appoint lead teachers or resource teachers (rather than DHs or SAs) who are solely responsible for supporting instruction in their schools. Some of the same barriers around workload and training would still exist, but this may eliminate some of the barriers that come with actors responsible for performance appraisal and evaluation attempting to take on a supportive function.



One of the SAs used the term “monitoring and accountability,” explaining that in their role, no coaching is actually taking place: “I have to monitor teachers to do their work as stipulated in all the policies. And then I see to it—yes, they must account for their duties, they must also account for their performance being good or bad. The accountability must be there. And this is my role to play ... I am actually not coaching. I am monitoring, I am workshoping them. I don’t like the word coaching. I am supporting and monitoring.” This SA explained that when they visit schools, they “go through learner books and check compliance with the [Annual Teaching Plan], observe lessons, and if necessary, demonstrate lessons.” From this SA’s description, “monitoring” is how the SA determines if and when to visit a given teacher’s classroom. The SA explained that “sometimes if I went to school and I picked up that the teacher has a problem, then I rearrange with the teacher so that I go and do classroom observation.” In other words, classroom-level support is not necessarily standard—it is used for struggling teachers only.

This is reflective of SAs’ responses to the interview question “How do you decide which classrooms to visit during a school visit?” in which five of the nine SAs described visiting classrooms based on performance; some SAs ask the DH to identify which classes need support, while others consult SA-SAMS, South Africa’s education portal: “We very much rely on the SA-SAMS, so you go and you look at SA-SAMS and which class has performed poorly, which classes need support and that is the class that we target.” While both SAs and coaches may need to target struggling teachers and provide feedback to these teachers more intensively than to others, how this is done matters. Introducing accountability or evaluative measures into the coaching process can present a major barrier to effective coaching (L’Allier, Elish-Piper, & Bean, 2010; Hofmeyr, 2019).

Finally, one SA explained what the term “monitoring and support” meant for their work. The SA noted, “Monitoring is when we visit schools and we sample the educator, and then we take the educator’s work and check the file, the lesson plans if it [is] according to the [Annual Teaching Plan] and check the learners’ books, if this teacher whatever he was teaching, it’s reflecting in the learners’ books and to check ... did the learner understand or not?” The SA then explained, “Support—it’s when I visit the classroom and when I’m in the classroom after looking at the teacher’s file. And if there are gaps, I’ll be able to show the teacher where the gaps are. And sometimes when I’m in the classroom and the teacher is teaching a certain concept, I will be observing the teacher and then I can come up with a ... intervention where I was looking at it and then seeing that there were gaps. So that is the level of the support that we are giving to teachers. If I’m visiting the classroom and there is no reading corner, where the learners are ... taught reading in groups, then I will help the teacher what is it that she should do so that she must create a space in the classroom so that she must be able to do the reading to create a reading corner. That is the support we are giving teachers. And when you call them to the workshop, we don’t only give them what we’ve prepared. We also give them a chance to come up with their challenges.” Based on this description, this SA sees support as closely related to monitoring and not necessarily related to engaging teachers around issues of instruction.

The data suggest that when SAs visit classrooms, the content of these visits differs from that of coaches. The SA above noted that supporting happens “when I visit the classroom and when I’m in the classroom after looking at the teacher’s file.” Similarly, another SA clarified, “You don’t want to disrupt a class when you go and visit. So, you will visit the class and request the teacher to continue with what she’s busy, request the files, request the assessments. And she continues with the lesson, and you go through the files.” Elmore (2008) asserts that educational interventions will be largely unsuccessful unless they address the three components of the instructional core: (1) the level of content taught, (2) teacher skill and knowledge, and (3) students’ active learning in the classroom. From the description provided here, it does not seem that the SA is focused on any element of the instructional core; instead, she is using the classroom as a place to look through teaching documents.

However, another SA described a different process when observing in the classroom: “I observe the teacher while teaching. I check—actually, not check—I observe her teaching methodology. I observe learners, the discipline in the class. I check ... is she following the timetable? It’s half past nine and according to the timetable, the subject that the teacher must do is life skills. Is she doing life skills? Is the class neat, is the class print rich, because our foundation phase classrooms need to be print rich. Is the teacher using relevant material in her lesson? Is the teacher following the lesson plan? Today is Friday, I check [that] whatever the teacher is teaching, is it according to her lesson plan. That’s what I do.” This SA seems to be conducting quite a different visit from some of the other SAs interviewed, illustrating again the wide variability in how SAs’ roles are perceived, specifically concerning the content of school and classroom visits.

## What teachers say

Teachers were asked to compare the visits they receive from their SAs with those they receive from their coaches. Only three of the eight teachers interviewed said that they had ever received a visit from both an SA and a coach. One of these teachers explained that when the SA visits, “They are checking the files. The DBE books—whether we have given learners work to do and whether we have marked the books and signed them. They also check how do we teach the learners.” When asked how these visits are different from or similar to a visit from the coach, this teacher stated, “Our coach sits down with us—or with me, rather. And [is] friendly, gentle and tells me ... to relax. Then we start with the lesson. I give him books and I also give him my lesson plan and start with my lesson, with the daily routine.” The teacher explained that during a typical visit from the coach, “When he enters my class, I give him a seat. I introduce him to my learners and tell my learners that they must behave because we’re having a visitor. Then he sits down. And then I start with my lesson. Let’s say, for instance, it’s listening and speaking. I greet my learners, we sing a song, and he advises me that when learners are singing, they must do actions. Maybe if it says eyes, they must touch their eyes and then I go on with my lesson, my daily routine.” The teacher clarified that the difference between the SA and the coach is that “[the coach], he is friendly. Not that the subject advisor is not friendly, but [the coach] makes me at ease. Yeah, so he tells me about the work that I’m doing and after that he gives me the comments ... he comments about my work and gives me the form to see for myself. Then he asks me to comment. But the subject advisor didn’t ... give me the form to comment [on]. I think that’s the difference.” This description suggests that the teacher sees the coach—unlike the SA—as engaging the teacher, listening to what the teacher has to say in the post-observation feedback process, and, ultimately, giving the teacher more of a voice.

Another teacher explained, “The support we get from [the SA] is that the time she visits us, she checks on our work, if there is anything we did not do correctly she then advises us on how to improve. And also, [she] provides support by giving us [Annual Teaching Plans].” This teacher explained that when the SA visits her class, “She just observes my teacher’s file, learners’ class workbooks, DBE books and also the lesson plan ... After checking them, they then provide me with a report or feedback indicating if my work is on par or if I am behind. If they get a chance they then come for classroom observation.” When asked to describe a typical coaching visit, the teacher explained that “when [the coach] comes, he is often friendly to us, he comes to my classroom for observing my teaching. Thereafter he scores my teaching method. If he feels that is something I did not do well or needs improvement on, he will then provide me with advice on what to change and he also gives detailed feedback.” This teacher noted that the visits from the SA are similar to those from the coach because “[the coach] also observes my teaching and learners’ books and also checks the lesson plan” but that the relationship is different because “our coach used to come to visit us more than the subject advisor.” In other words, this teacher identifies frequency as the most common difference. Vanderburg and Stephens (2010, p. 157) argue that in teacher professional development, “the typical pattern is for teachers to be formally evaluated once or twice a year and provided with feedback at that time, but not for them to receive ongoing support from someone whose job is not to judge them but to help them become better teachers.” Frequency and ongoing support are identified by the teachers in the present study, and in Vanderburg and Stephen’s study, as significant.

Ongoing, timely support is not only more effective than traditional one-off trainings in shifting outcomes but also comforting to teachers because it allows them to ask relevant questions, make changes, and, critically, see the positive results of their own changed practices (Guskey, 1986, 2002). Findings from the *Early Grade Reading Program Evaluation: Case Study Report 2020* (Prew et al., 2021) reinforce the need for ongoing support to build the relationships that may actually help nurture change. The report states that “positive reactions to the EGRP coaches were, however, not universal: in half of the schools, negative statements were made about their coach to the researchers. Teachers said this was because their coach had only visited once and conducted a cursory visit; or because, when the coach had resigned or been changed, there had been no communication received by the school or teachers on the reasons for the change” (Prew et al., 2021, p. 33). It is important to note that for most teachers, simply having a coach is not enough—the coach needs to show up regularly and be available to provide consistent feedback. This is a key issue that would need to be resolved for SAs to provide effective coaching in schools.

Neither of the two teachers quoted above pinpointed major differences between the coach and the SA when asked about the differences in typical visits. However, both teachers noted that the coach was in the best position to give them the kind of support they need to improve their teaching and described coaches as having a significant impact on their teaching. One of these teachers explained that “now my learners, most of them they can read and most of them they can recognize the sounds, most of them can write ... [My coach] helped me to be efficient and teach the learners with confidence. He often conducts workshops for us. He will advise on the teaching methods to use, such as phonics, writing, and reading. This helps me to improve on how to teach.” Similarly, the other noted that “I have improved a lot because since we started the course it was a bit difficult for me but now I have improved a lot because [the coach] advised me to do some things that I didn’t do before ... [like] shared reading, [which] I was doing but not properly. But then he explained to me how to approach learners when doing shared reading.” In other words, both of these teachers described the coach as helping them improve specific instructional practices in their classrooms.

Perhaps obviously, more significant differences were described by teachers who reported never having had a classroom visit from an SA. One of these teachers noted that “[the visits] are different because the coach comes to the class. And then she will sit with us in the class and check the lesson. I’ll be presenting the lesson. She will be here looking at me and doing the lesson and then after the lesson we’ll sit down and talk about the lesson. She will give feedback after the lesson and if she picks up something and then she will inform you how to do it, maybe there is something I did not do well, she will just say, ‘No, do it like this.’” Another stated that “it is different. And is very different—with [the coach], it’s quite productive. It is positive—I can say that it is one thing that I’ve always needed.” It seems that by observing teachers in action, coaches target instruction and hone in on shifting the “instructional core.”

Overall, teachers believed that an external coach was in the best position to give them the kind of support needed to improve their teaching practices. Of the eight teachers interviewed, five described their coach as being “number one,” with an additional sixth teacher voting for the coach and the DH together. These six teachers who selected the coach were the teachers who had received regular coaching visits. One of the teachers simply stated that “the coach is more supportive than the subject advisor,” while others went into detail when describing their selection: “The coach comes to the class, the coach guides you, and their workshops are very informative. When you go to the workshops, they explain each and everything how to make a lesson plan, simply to start with, maybe when we are doing reading and speaking. They give examples how to do anything ... They are the ones whom I have seen coming to the class, they are the ones whom I’ve seen myself sitting down with them, doing the work together, sharing information together, maybe when I present a lesson they are the ones that correct me when I am wrong and give me the right things to do. But the subject advisors, we have never seen them in class, they do not come to check the activities of the learners.”

In summary, while SAs may be expected to visit classrooms during their visits to schools, it seems that this often doesn’t happen in practice—and when it does, it may not be focused on instructional issues. Again, this can likely be attributed to difficulties reaching schools (transportation issues) and substantial workloads regarding the number of schools and teachers they are expected to support (ratios). Although coaches and SAs may provide some of the same services (for example, workshops), the way in which these activities are carried out and the affective component of these activities seems differ between the two groups. While not all coaches embrace the exact same description of the coaching role, they all refer to the need to support change at the classroom level by helping teachers with issues related to instruction. It seems that coaches not only provide more contact hours but also offer a type of support that is often—but not always—distinct from the monitoring that is provided by SAs.

- **What tools are used to guide or record the visit?**

Findings from the interviews and observations conducted with SAs suggest that SAs do not use a standardized tool to guide or record their school visits. SAs described creating their own tools at the individual, district, and provincial level. For example, one SA explained, “They never developed any provincial tool—a monitoring tool for us. So we subject advisors have decided to develop our own monitoring tool because some [are] not doing monitoring the same way ... We cannot have a common school visit tool, provincial school visit tool because our dynamics are not the same.” In addition to creating their own tools, a few SAs described using resources provided by past and current interventions, such as the Primary School Reading Improvement Programme, EGRS, and EGRP. In a way, the variability in tools used during visits reflects the inconsistent way in which SAs define their roles in schools and in classrooms; for example, an SA who is using a self-made tool and who believes her role is to monitor teachers’ files to check for alignment with the Curriculum and Assessment Policy Statement (CAPS) will be guided very differently from an SA who has been given a coaching tool from the EGRS and takes on some of the instructions given to coaches from that intervention.

The lack of a standard tool may represent another instance of what seems to be a main challenge for SAs: resource constraints. As noted above, limited transportation resources pose a major challenge for SAs that threatens their ability to effectively carry out their core function of being in schools. During their interviews, SAs were asked about the resources they are provided with for their school visits. The only reliably provided resource seemed to be a laptop, with seven of the nine SAs stating that they had been given laptops. In the DBE’s *Subject Advisor Profiling Study* (2020, p. 2), one of the findings was that “subject advisors need more resources: Although all of the interviewed advisors reported that they had access to necessary policy, curriculum, and education resources, there are evident shortfalls in other resourcing areas, most notably transport shortages. Access to computers or laptops was reportedly higher, however, many advisors noted the need for better data provision to work remotely.” The findings from the present study are aligned with this conclusion; however, the lack of a standard school visit or lesson observation tool may represent an instance in which even educational tools are not provided.

On the other hand, as one may expect from the consistency discussed above, during observations of the EGRP coaches, all the coaches were observed using the same tool to guide their visits. First, this tool seemed to help focus coaching visits around observing lessons. Second, it seemed to help structure the specific way in which lesson observations were conducted: the coaches were all observed communicating with teachers before the lesson observation began about the lesson that would be taught, observing teachers' execution of the teaching methodologies as per the lesson plans, and conducting post-lesson feedback based on the observation. In other words, the tool was more than just a formality for recording their visits—it helped ensure that coaches carried out a certain protocol and that this protocol consistently informed their visits.

The disparity seen between coaches and SAs with regard to a standardized school visit tool represents more than an issue of resourcing. It also represents a disparity in protocols for conducting school visits. Coaches, unlike SAs, are equipped with both the training and tools to conduct standardized, thorough, and constructive support visits. For coaches, these tools may operate similarly to the way that structured learning materials operate for teachers in that they help reinforce certain methodologies for observing and interacting with teachers. While a coach may inject some of their own personality and style into the coaching process, the tools help provide a basic, consistent structure, allowing coaches to carry out the methodology with expertise. Further, just as teachers are provided with ample training to utilize structured learning materials in their classrooms, so too are coaches provided with extensive training over the course of an intervention on using the tools constructively. In other words, the tools are more than just a piece of paper that coaches must fill out—they are a guide for the process of conducting lesson observations.

Beyond helping individual coaches, standardized coaching tools provide structure to an intervention. The usage of a standardized tool over time helps create a picture of progress (or stagnation, as the case may be) by providing consistent information over time (for example, a picture of one teacher over multiple visits, across multiple years) and across schools. This consistency may have several positive consequences. First, as mentioned above, the protocol allows coaches to consistently practice and gradually become experts in best coaching practices. Second, it may help coaches feel more confident and supported in their own work. Third, it makes quality assurance easier to conduct on the part of service providers because they know exactly how a visit should look. Fourth, and perhaps significantly, the consistency in coaching visits may help ensure that teachers know what to expect when a coach observes their classroom and thus feel more at ease. Finally, the consistency and transparency of the form (which teachers look at and sign) may serve to build trust between the coach and the teacher.

In contrast, as revealed by the interview and observational data, SAs do not seem to be provided with any kind of standardized tool for guiding their school or classroom visits. Again, this is not just a formality (in which SAs lack a simple piece of paper) but representative of a larger reality: SAs are not provided with standardized guidance or extensive training on how to conduct their visits. While coaches enter classrooms knowing exactly what to look for and how to deliver constructive feedback to educators, SAs do not. Because SAs often must make their own tools or use tools that other people have shared with them, there is a significant lack of consistency across time and schools. This not only makes it difficult to measure school or teacher progress—since the kind of information being collected may vary greatly from year to year or school to school—but may also erode trust between SAs and schools (including teachers). Teachers may thus be more nervous when an SA shows up at their school because they do not have a good idea about what the SA is looking for or monitoring. This lack of structure and guidance is arguably a major disservice to SAs.

- **Can SAs' relationship with schools and teachers be characterized as one of monitoring or support? Why?**

As discussed above, there is no straightforward answer to this question. First, these terms and the SA role are defined differently by different people. Moreover, the extent to which SAs are able to support is dependent on a number of factors. The data suggest that SAs would like to be supportive of their schools and teachers but that time and resources may constrain their ability to provide substantive support. Instead, in practice, many SAs carry out mainly administrative duties, such as monitoring.

- **How do SAs' roles and perceptions change when an external coach is in the school?**

One coach, a former SA, stated in his interview that coaches have the potential to make the work of SAs easier, explaining that “the projects are for piloted schools. There are those schools that are not doing the project. So, I thought maybe if the coaches are there, they alleviate the burden to the subject advisors. How? The time when I was a subject advisor, there are those schools that I couldn't reach for that year, nna? But now that there are coaches and they are doing a good job, then as a subject advisor, yes, I can monitor some of the schools. I can sample some of the schools that are supported by the coaches and go to those schools that I never had a chance to monitor and support.” In other words, coaches could potentially help SAs by allowing them to focus on their non-coaching schools—the question is, does this happen in practice?

When SAs were asked whether their roles changed in schools that had been allocated an external coach, their responses were split, with half reporting that their roles changed and the other half reporting that they did not (one SA was not asked this question in their interview). The range of opinions was vast—one SA stated that “it has drastically changed,” another explained that “it does change in a subtle way ... I tend to take a step back and allow the coaches to continue with what they are doing at the moment with the teachers. And then I support. And I agree, because the minute the teachers see, oh, the subject advisor is in agreement the results are far better,” and yet another stated, “Not at all because we are working hand in hand.” In other words, there is no consensus about whether or how the presence of coaches changes SAs’ role in schools. While some SAs may take advantage of the extra help in some of their schools, giving them the benefit of a lightened load, others may feel the need to work together with the coach, which ultimately creates more work for them or affects their duties in certain instances.

One SA explained that “[after coaches leave the schools] it changes. Everything that needs coaching. I offer that coaching skill to them ... when time comes that those particular coaches, they are now not there, you act as a coach ... [Coaches] are not given the permanent residency in piloting those particular programs. So, we have to monitor and support and play a role of being coaches in those, because particularly new teachers are appointed. You need to impart the information that was never imparted to them. So, you start afresh to coach the newly appointed teachers.” This SA’s assertion suggests that the biggest impact on SAs’ roles may occur after a coaching intervention has ended. It also suggests that coaches’ presence in schools could possibly have an impact on SAs’ roles beyond the duration of a singular project because SAs’ roles may shift after an intervention has ended, especially if teachers want, need, or expect coaching to occur.

DHs and teachers did not seem to notice a large difference in SAs’ role with the introduction of an external coach. Two of the DHs interviewed were asked whether their relationship with the SA had changed since the EGRP was initiated. One of these DHs simply replied no, while another explained, “I can say it has changed because their workload now is not so much like before. EGRP is doing a lot of work for them. Yes, so, when they come there, they’re satisfied most of the time.” One teacher answered the question “Did the support you receive from the SA change when you started getting visits from the coach?” by noting, “It has changed. The subject advisor when she’s here, she doesn’t spend a more time like before, yes but she gives me the advice [on] ... how to approach learners and to respect learners.” It seems that both DHs and teachers do notice instances in which the coaches lighten the load for SAs by allowing SAs to spend less time in certain schools.

On the other hand, most teachers stated that the support they received did not change with the introduction of coaching visits. One teacher explained, “No, no, no, no, no, no, no. Well, you know why I say that? When we go to workshops, especially with my coaches, my coach makes sure that my subject advisor is there ... So whatever that she’s going to look at in the classroom, it also correlates with my coach ... So yeah, that’s why I’m saying that when the coach is there, then my subject advisor is also there. And she knows whether my coach is coming or not.” While this teacher stated that the support from the SA did not change with the introduction of the coach, the teacher did describe the SA potentially taking on slightly new or different roles to ensure alignment with the coach.

Overall, there do not seem to be huge changes for SAs in how they perceive their roles when external coaches enter schools and begin coaching. However, the data do suggest that SAs’ roles may shift slightly with the presence of coaches in schools.

## Research Question 2

The second research question guiding the study was, **What is the nature of DHs’ support to and relationship with teachers and SAs? (What does this three-way relationship look like?)**

In the EGRP intervention, DHs in a group of 40 schools have received extra training to enhance their ability to provide coaching to the other teachers in their schools. Three of these DHs were interviewed for this study. While it was difficult to extrapolate themes from the DH data because of the limited volume of data, some interesting points emerged that supported assertions made by SAs and coaches.

- **When and how do DHs give support to teachers? Is this formal or informal?**

The DHs interviewed defined their roles in different ways. One DH explained, “My role is to monitor, moderate, do lesson observations, class visits, and support educators,” while another explained that “I would say that I support educators by having professional support forums at school level and then I usually monitor and moderate their work and then visit them in classes ... Sometimes if there is a need, even if it is not planned, I do visit. And I have an open-door policy, they are free, they know that they can come to me if there is something they need to be clarified about.” Both of these DHs used the words “monitor” and “moderate”—terms that are more similar to SA terminology than coaching terminology in terms of job function. However, the third DH did not use this same language; this individual noted that “my role as a DH is very hectic. I have to assist in more, in all the spheres.” It thus seems that some aspects of the DH role are formal (monitoring and moderating), while others (such as having an open-door policy and being willing to assist teachers as needed) are informal. It is likely that the constant presence of the DH in the school, and the relationships that can be built because of such frequent access, opens possibilities for more informal support to occur. This is a significant and appealing factor when considering DHs as sources of teacher support.

One of the DHs discussed the barriers to providing support to teachers in their classrooms: “[The] program of EGRP, their resources are so good man ... It’s just that maybe DHs could be ... maybe left out from the class to support the educators full time. Because sometimes you do go to classes, you visit, and the teachers are prepared but after that you will not know what is happening ... maybe if we were exempted from teaching, maybe that would be easy, especially in a school of this nature, the large numbers in the classes ... It’s a challenge, and that is why we don’t notice other learners who are not performing so well. Yes, maybe if we had time on our hands, we would be in classes every day and they would know that because we are always free, we can come anytime, even unannounced.” Here, the DH exposes the most glaring barrier to DHs conducting instructional coaching: the lack of sufficient time to observe instruction<sup>7</sup>. In the FP, DHs serve as class teachers with a 97% teaching load. Practically, this often means that DHs serve a full teaching load, as there is rarely someone to relieve them from their class teaching to complete extra work. When asked for their opinion on DHs becoming coaches in their schools, 15 of the 24 coaches and three of the nine SAs interviewed noted that workload was a significant issue for DHs and that this workload would need to be reduced for effective coaching and support to teachers to be possible. Therefore, while DHs have the advantage of proximity to teachers, their workload is a major factor in preventing them from providing effective instructional support to teachers in their classrooms.

Teachers did not describe the support received from DHs in a uniform way. Several of the teachers mentioned the positive aspect of the DH being school based, and the access that this provides them as a source of support: “[Visits from the SA are] different because [the] SA comes once a quarter, sometimes they come twice, while the DH since she is available with us, she comes often to observe us.” Another teacher explained their opinion that the coach and the DH are in the best position to help teachers improve their instructional practices, explaining that “my DH is always in the school premises. [And] the coach visits us when he promises to visit, he fulfills his promise.” A third teacher noted that the DH is the best source of support because “I’m with the DH most of the time. I can always go to her and seek advice at a school level.” Still another teacher explained that “the subject advisor, he or she is someone who is there but my departmental head is like my 911—she’s here ... She is always here. So whenever I need some information or clarity, I go to her.” Just as teachers discussed with positivity the frequency with which they receive visits from their coach, the constant availability of the DH seems to have a real impact on teachers feeling supported.

Two teachers provided useful descriptions of what support from the DH looks like. One teacher said, “When she’s in the classroom she takes a seat. [She] sits down and you get on with the lesson, and you will proceed then she will listen, she only just gives feedback after [the teacher is finished] presenting. She does not disturb you during the lesson. After the learners are doing something, [like] maybe I’m giving them an activity, she’ll go around and mark that activity and put a stamp [on it].” Another teacher explained that “I can give two examples, like right now I have different kids in my classroom. They are struggling with their handwriting skills. I do good handwriting on the board, but they cannot copy what I’ve written there. So she’s mainly helping me with that, the handwriting ... I asked her, ‘How do you do it?’ Then, she will come to my class and address the learners and all that. And the other one has helped me in terms of helping my learners to have a routine of reading and I’ve seen a major improvement in my learners in my classroom.” Both of the DHs referenced appear to have been influenced by the presence of coaching in their school and have taken on some of the formal coaching roles, even though neither of them is based in an EGRP school where DHs have received training to conduct coaching.

<sup>7</sup> This issue of time constraints and heavy workloads is consistent with programs in other countries, like Nepal. Through the EGRP intervention, head teachers (HTs) and basic level coordinators (BLCs) were selected to provide ongoing teacher professional support (TPS) through classroom observations and feedback. However, HTs and BLCs were found to face difficulties implementing the TPS system “due to factors such as heavy workloads, lack of personnel, and lack of confidence with early grade reading instructional approaches” (RTI, 2022, pp 15-16). As a result, the EGRP II worked with the Government of Nepal to stipulate other options for local governments (LGs) to provide the needed TPS. For example, LGs can choose to appoint resource teachers to carry out classroom-level observations and teacher feedback sessions. Perhaps in the context of South Africa, with the discretion that already exists a decentralized, provincial level, a list of viable options for conducting ongoing teacher support and coaching would be more effective than trying to implement one standardized approach. This is certainly something to consider and explore later.

Finally, one of the teachers was quite negative about the support provided by the DH, explaining that “you go to the DH but usually we can see that our DH [is at] the same level as the educators. So there is not enough information from DHs.” This teacher seemed to be open to receiving support from a DH but did not feel that the DH was equipped to give the kind of support needed: “I can say the department should train the DHs. So that they must not [be] on the same level as educators, so that if we have some problems, we can go to our DHs and ask them something ... To me, DHs are at the same level as us the teachers. So, sometimes when you ask her something, she just took the phone and asks [the SA].” This issue—the lack of expertise among DHs—was discussed by SAs, and the need for more extensive training was also discussed frequently by coaches. If teachers feel their DHs are not equipped to help them, this could inhibit the potential benefits of having a support system within the school and minimize the informal help that teachers may seek from DHs. In addition, as noted by Evans (2022), meaningful coaching may not be able to occur without the expertise required to help teachers build their repertoire of instructional practices. This is also reflective of Chauraya and Brodie’s (2017) assertion that professional learning communities are unlikely to be effective in low-functioning systems because teachers do not have repertoires of best practices to share with one another; expertise is needed for improvement in these systems. However, the usage of high-quality structured learning materials may help to mitigate the need for such expertise. If DHs or SAs are expected to conduct meaningful coaching in their schools, structured learning materials are likely to be critically important for guiding coaching.

Despite DHs’ proximity to teachers as school employees, DHs still face significant barriers in their ability to support teachers. First, the role that DHs are expected to fulfill is varied and inconsistent. As a result, the support that DHs can provide in their schools is largely dependent on the individual person. Second, DHs are appointed within individual schools, and it is important to consider the reality that DHs may be appointed for a variety of reasons, which may or may not include pedagogical expertise. It is unclear which skills are valued and prioritized when DHs are appointed to their posts. In cases where all teachers in a school are at the same level in terms of instructional skills and knowledge, it may be that management skills or organizational skills are highly valued; or it may be that principals push to appoint teachers whom they like best or have the closest personal relationship with. The Department of Planning, Monitoring and Evaluation’s (DPME) implementation evaluation report (year) asserts that “Partly responsible for the weak instructional leadership exerted by [DHs] and subject advisors is the appointment of inappropriate candidates to these and other promotion posts” (pg. 5), and argues that “DBE must review and apply merit-based appointment and promotion policies and processes for educators” (pg. 7). Clearly, the most suitable candidates for supporting teachers and teaching are not necessarily the ones selected. While some DHs may be respected by other teachers for their ability to provide help and support, other DHs may struggle in their roles. This may further feelings among other teachers that DHs in particular are not capable of assisting them to improve.

- **Do DHs conduct classroom visits? How often?**

According to the observational notes written by fieldworkers, DHs were observed mostly in their role as DHs—not in their role as DH coaches. In other words, the DHs were not observed going into classrooms and assisting teachers with their instructional practices. According to the EGRP DH coaching intervention design, two external coaches each support 20 DH coaches. Each DH coach is meant to visit three teachers in a week. Each teacher is expected to receive at least three visits from their DH coach per year. However, DHs workload has not been reduced – meaning that in the FP, DHs are also class teachers with a 97% teaching load.

The DH coaches were asked about whether they conducted lesson observations. All three of the DHs interviewed affirmed doing this with various levels of frequency. One DH said, “I was always in the classes with the educators doing observations, like every month.” Another DH explained that “I usually do them on a monthly basis. Yeah, each and every month I see my five teachers. I see them on a monthly basis.” The final DH stated, “Because formally when I do visit, we visit them once a term, and then informally we have scheduled our meetings ... in the phase plan. Yes, and then others which are also informal are just any time.” The same DH went on to explain, “I observed them all last year, because in the first term I observed others and then in the second term others, and then again in the third and fourth term because the second term is for [quality management system] ... So, for all of them by the time the year ends, I would have already observed, even if I don’t observe them at the same time.” Therefore, although this DH does perform monthly visits, from her own reporting, it seems that in the previous year, she managed to visit each teacher in their classroom just once during the year.

DHs also seemed to face some challenges in conducting lesson observations. While DHs are housed in the same schools as their teachers, the interviews revealed that there was still some difficulty in DHs being able to visit teachers' classrooms. This is reflective of the data regarding the workload (and especially teaching load) that DHs carry. One DH noted that the workload is intense: "Maybe DHs could be just given or maybe left out from the class to support the educators full time. Because sometimes you do go to classes, you visit, and the teachers are prepared but after that you will not know what is happening. It's not most of the time. Maybe if we were exempted from teaching, maybe ... it would be easy, especially in a school of this nature, the large numbers in the classes." Again, this represents a significant barrier for DHs to provide coaching; if DHs cannot spend time observing teachers teach and discussing specific instructional issues, then the important work of "disrupting pedagogies" and implementing new, more effective teaching practices cannot really take place.

- **What tools are used to guide or record DHs' support to teachers?**

When asked about the resources they are provided, two of the three DHs did not answer as expected; rather than discuss observation or support tools, these DHs discussed the EGRP structured learning materials. One DH answered, "Posters, theme vocabulary words, these small reading books, we got a suitcase full of material, yeah like those with alphabets A–Z, with the words, we have the world charts," and the other, "The posters, we have posters for listening, speaking and reading and we have word cards, flash cards for both languages, English and Setswana. Then we have readers, it's for group guided for Setswana and English, even if there are not enough for English." While the third DH mentioned receiving "monitoring and moderation tools," they did not go into detail about the tools. The DH was unfortunately not asked where the tool came from, so it is unclear whether it was provided by the SA, the EGRP, another DH, the school principal, or someone else.

The reference to the EGRP resources over and above any other tools could potentially be a sign that the DHs interviewed are focused more on instruction than on monitoring teachers' files or learners' books. Or it could simply signal the significance of the resources provided as part of the bundled EGRP intervention. While the EGRP structured learning materials are critical tools for supporting and coaching teachers (a necessity, as Evans (2022) argues), it is interesting to note that none of the DHs referenced any kind of lesson observation or coaching tool to help guide their observations or discussions with teachers—something that all the coaches who were observed used to guide their lesson observations.

When the DH coaches were shadowed, one was observed to be in possession of a lesson observation document, while the other two were not. Because no lesson observations were observed during the DH coach shadowing, it is difficult to know whether DHs are in possession of a standardized observation tool and if they are equipped to effectively use it. Again, as discussed in the previous section, the usage of such a tool is more than a formality—it can represent a more significant protocol. Among other requirements, it seems that an effective coaching protocol would need to be put into place for DHs to successfully conduct coaching.

- **Do DHs report to anyone? What does that reporting look like?**

DHs were not observed reporting to anyone, and they did not discuss any reporting requirements in their interviews. Without any other indications, it is assumed that DHs trained to do coaching in the EGRP follow the same reporting procedures as other DHs and report to the deputy principal or the principal, depending on the size of the school.

- **Can the relationship between teachers and DHs, and between DHs and SAs, be characterized as monitoring or support? Why?**

### ***Teacher and DH relationships***

When asked about their relationships with other teachers in the school, all three of the DHs interviewed responded that they have positive relationships with their teachers. One DH stated, "I think I've got a good relationship with [the teachers] because I'm approachable. Most of the times when they've got problems they can come to my class and I assist them. If they don't understand some things I call them, I demonstrate to them as to how that thing should be done." Another DH said, "I think I have a good working relationship with them all because since I came here in 2017, they don't give me any trouble. Except that sometimes maybe late submission but they comply most of the time." The third teacher explained that "I'll give them a report, especially after the monitoring process and then I will support them" and that "we are a team, we support each other. If maybe there is a teacher that needs help, I normally remain after school with them and then we sit and discuss how we can best tackle the issues they have." This third DH, notably, uses both "monitoring" and "support" in her description.



The language of compliance—rather than the language of “critical friend”—seems to characterize the DH interview data. In this way, the language used by DHs feels more in line with that utilized by SAs than that of coaches to describe their work. For example, the word “approachable,” used in an interview above, does not suggest a comfortable closeness. However, there is evidence in the DH data that DHs’ physical closeness and availability to teachers (during school hours and after school) allows for more frequent and regular support than other external actors can provide. Motilal and Fleisch (2020) observed and interviewed teachers in two different treatment arms of the EGRS I. Like Vanderburg and Stephens (2010), Motilal and Fleisch found that teachers in the coaching treatment valued consistent feedback and displayed changes in their instructional practices. They argue that teachers who had support (and not just training) were able to observe positive changes in their own classrooms and thus ultimately be more receptive to the changes. They emphasize that “the change in practice must be accompanied by ongoing support and an ability to analyse what is working and what is not” (Motilal & Fleisch, 2020, p. 9), which teachers may not be able to do on their own. The authors argue that coaches help teachers by giving this ongoing support and encouragement. While DHs may face certain barriers to providing adequate coaching, they have the potential to be a consistent and ongoing source of support.

In the classroom observations completed for this study, one of the DHs alluded to teachers coming to her for help “especially in the beginning of the year and new teachers.” During this time, teachers asked the DH to check certain documents—much like that discussed earlier whereby SAs check (and sign) documents. Further, at multiple points during the observations, teachers were observed engaging with their DH to ensure compliance. This therefore suggests a focus on compliance and not necessarily coaching in the DH-teacher relationship.

Of course, language is not static, and the language used by DH coaches has the potential to change over time and after receiving training. It is useful to remember that South Africa’s DH coaching program is still in its infancy. It may be useful to assess whether and how DHs’ language—particularly with regard to their roles—changes after a year or two of extensive training and support from an external coach.

### ***DH and SA relationships***

Finally, SAs were asked what kind of support they provide to DHs. First, all of the SAs noted that the support is the same for all DHs, regardless of whether a DH has been trained as a coach. Six of the nine SAs (66%) noted that they provide workshops for DHs. These workshops seem to be workshops or “inductions” that are specifically for the DHs (and not all teachers). Five of the SAs noted that they provide some extra support to the DHs. One SA explained that “at the school, yes. And even when we meet, I’ll ask them, ‘How is it going?’ You tell me I have a problem, I have, I’m succeeding, so just to say how is it going for me to support that I want to offer if you have a challenge.” Another SA provided a detailed explanation of the support offered to DHs, stating “Lots and lots of support. We develop them to know, what exactly that is done in the classroom every day. So, the [DH] should know what is it exactly that should be done each day in the classroom. Even if she’s not there, she must know, according to the plans that should be submitted to her. That, for this week, this will be done. And, how to monitor the plans that are submitted to her. How to moderate the assessments that are submitted to her. How to assist the educators with the different methodologies, when they want to improve performance especially after each term, when they’ve developed their subject performance improvement plan. That is the kind of assistance that we are offering to our [DHs].” Extra support, and even extra care, seems to be given to DHs, as evidenced by the above data. It seems that, perhaps, some of the limited time SAs have in schools may be spent providing support to DHs. Additionally, perhaps because the work of DHs seems quite similar to what SAs do on the ground, SAs feel comfortable and equipped to provide them with extra support.

#### **• When a DH is trained as a coach, how does this change their relationship with the SA?**

SAs largely reported that their relationships did not change with DHs based on DHs’ training to become coaches. Two of the DHs interviewed were asked whether their relationship with the SA had changed or stayed the same since being trained to do coaching. One of the DHs said that it hadn’t changed; the other stated that “it hasn’t changed” but then went on to describe subtle changes: “I don’t think it has changed, but I think a little bit here and there it has changed because they’ve got a little bit of trust in me.” In addition, one of the DHs alluded to a potential role change, saying that “the EGRP, they are giving us a lot but before them the subject advisors would give us support.” These quotations serve as evidence of subtle changes in schools where DHs are trained as coaches.

### Research Question 3

The third research question sought to gain information around perceptions of support, asking, **What are the perceptions of teachers, coaches, DHs, and SAs around mechanisms of support?**

- **What are SAs' perceptions of the value and quality of support from external coaches?**

When asked to describe the quality of support provided by the external coaches supporting their schools, SAs spoke with overwhelming positivity about the work of coaches; eight out of the nine SAs interviewed (88%) spoke highly of coaches' work. There was just one SA who had a less glowing evaluation of external coaches, who noted that "they were good but some of them were struggling because they were hired as foundation phase coaches but did not have experience working in the foundation phase." The other eight SAs made comments such as, "Their role was so good ... because they monitored the teacher, they went to schools, they sit in the classroom, and then they develop the teachers. Their role was so important"; "I don't want to lie, those people are supporting our schools, the coaches are supportive, it is evident in the logbook every time when I visit the coaches' schools, I will check the previous visit of the coach, they are there, like really for now coaches are supporting these schools 100%"; and the "EGRS coaches were magnificent." In their commentary about coaches, three of the SAs noted that coaches were able to provide frequent, targeted support—and that this was positive for their teachers.

In addition to noting the positive impact of coaches on teachers, two of the SAs referenced the positive impact of coaches on them. One SA stated, "I don't want to lie. They have developed me. Honestly, I have gained a lot from them. Because normally when [they] conduct those workshops I do attend ... we share with them ... [The quality of support is] wow." Another SA went into more detail, explaining, "It was so huge. It made a positive impact, especially in my subject. I've been groomed. I've been developed. I've been grown a lot ... in terms of coaching my teachers, in all components that were coached by the external coaches during their implementation. I was developed too, because I didn't know other methodologies, but the methods that they came with, it has made me to be more knowledgeable." This again suggests that the presence of external coaches in schools may have an impact on SAs' roles and that the more intensive training received by coaches could possibly encourage the development of SAs' skills and knowledge as well—both through SAs attending trainings by coaches (discussed more below) and through informal interactions with coaches in and out of schools.

- **What are SAs' and coaches' perceptions of the value and quality of support from DHs?**

SAs were asked to identify the main differences between support provided by a coach from outside of the school and support provided by a DH within the school. Two SAs did not clearly answer this question; another six argued that the coaches are better or more experienced than the DHs because of training, experience, and workload; and one SA expressed the opinion that there is "no difference" between the coach and the DH.

In the EGRP, there are 40 schools in which DHs are being trained by coaches to do coaching in their schools. Three of the SAs interviewed said that they do work in schools where DHs are being trained in this way. One of these SAs explained that coaches have more experience and professional development than DHs. She argued that DHs do not have time to support teachers, do not and cannot conduct lesson observations in teachers' classrooms because they are teaching their own classes, and do not give feedback to teachers. The SA stated that she does not believe that DHs should be coaches; in her opinion, training DHs to do coaching "is not working at all." For this to work, the SA argued that DHs' roles would need to change. A second SA agreed that coaches provide better support than DHs, stating, "Always the support from outside always will be greater than that that's given by the internal department head within the school." The third SA argued that the main difference is that the DH is "on the spot"—in the school every day—whereas the coach comes only once a month. This SA stated that being trained as coaches has helped the DHs be more effective in their jobs; "since these DHs have been coached, I could see that they have changed their way of monitoring and moderating the work of the teachers" and that "some of [the DHs] have plans of how they will be visiting the teachers in the classroom to see that teachers are doing the work as expected."

It seems, from the explanations given by SAs, that the work DHs do is more similar to the work of an SA than a coach. For example, SAs noted DHs' heavy teaching load and how this prevents them from being able to support teachers in their classrooms. One SA stated, "The departmental heads in the foundation phase are full-time class teachers, so they don't have time to monitor and support other teachers ... She doesn't have any free period to go and visit the other teachers. I think mainly what they're doing [is] taking the files at the schools, and then monitoring the learners' work and the teacher's file." Interestingly, this description resembles the way that coaches and some teachers described the work of SAs in schools.

Coaches seemed to express more positivity about DHs becoming coaches in their schools. Half of all the coaches interviewed (12 out of 24) said that they thought it was a good idea for DHs to be trained to conduct coaching, noting that DHs are in their schools every day and that it can help with the sustainability of interventions. One coach explained this clearly: “You know, I think this is a good program for [DHs] to be coaches at school. They are at school every day. They are going to schools after a long time, so they see things every day at their schools. So basically, that will sustain the program, that will improve a lot of a school level because they are there every day and they are being paid for that. That is not something extra, they are curriculum managers, basically. So that is basically what they’re supposed to be doing.” Eight of the coaches noted that it was “doable” for DHs to become coaches but that doing so successfully depends mainly on adequate training and a reduced workload. Some were more tentative than others. For example, one coach argued, “I think that would be a brilliant idea to have some departmental heads to be coaches. The only thing is they need thorough training in that,” while another noted that it depends on the individual DH and that not all of the DHs are skilled enough to become coaches: “If we have to tell the truth, some of the head of departments, they don’t really know what is expected from them ... one of the major duties of the head of department is to develop teachers. So, if really the [DH] [doesn’t] know that her core duty is to develop the educators, I don’t think that [DH] can be a coach.”

As discussed earlier in this report, coaches frequently brought up the issue of training, citing the specialized training that is needed to become a coach. Indeed, 16 of the 24 coaches interviewed argued that training would be a necessity for DHs to become coaches, making it the most commonly mentioned issue by coaches around this topic. One coach expressed the feeling that additional training was needed but also the doubt that this might not be enough: “Maybe we can train them how to coach. But the question is, will they be ready?”

The discussion regarding DHs included thoughts about what would be needed for DHs to become effective coaches. Fifteen of the coaches noted that workload was an issue for DHs and that it would need to be reduced for effective coaching to be possible. Similarly, workload was mentioned by three of the nine SAs interviewed. One coach mentioned, “For the foundation phase, maybe the challenge would be the work overload. Because foundation phase [DHs] are full-time class teachers.” Another coach cited the concerns of the DHs themselves, noting that “they are asking us questions. ‘Ah, I’m I going to cope? I’m I going to manage this?’ So ... they’re not sure if they’ll be able to do that. Because they’ve got too much to do. They have to do the coaching ... they are complaining about the workload.” From this perspective, it is not only coaches and SAs who are concerned about DHs’ workload, but DHs themselves who are worried as well.

Another related issue that came out was the need to “empower” DHs, build their confidence, and build their leadership and other soft skills (7 of the 24 coaches raised these issues). As one coach argued, “In order for them to [become coaches], they need to have their workload reduced. And they also need to be—what’s the word? They need to be empowered. Yes, empowered even more, to take this this role.” Another coach outlined a plan for how to “upskill” DHs to do coaching along these lines, explaining that “they need to be empowered, maybe for the first year, if I can suggest that they be empowered properly. And then maybe the second year, in a semester, they should be empowered ... Empowerment number one, if they must be upskilled on how to interpret departmental policies. Two, they must be upskilled on emotional intelligence. Three, they must be upskilled on how to maybe control and support the teachers. Four, they must also be empowered on leadership skills.” This description is a good illustration of what this coach believes is essential for good coaching.

One concern that was noted by three coaches was the issue of school politics. Although this issue was not widely discussed, it represents a concern that may be unique to DHs given that they are located within the school setting. One coach noted that “in some schools, you find that there is more of internal wars between the teachers and [DHs]. So, as a result, the educators are not prepared to take whatever the [DH] says. So, there is no cooperation. So, if there is no cooperation between the two, how is it going to be possible that the other one is going to coach the other one?” Another stated that “there are some school politics whereby, me as a teacher, I am a friend to the principal, I’m a friend to the deputy principal, so whatever my [DH] is telling me, I don’t take it. So, I become so difficult, and then it becomes so difficult to the [DHs].” One of the SAs interviewed also noted that teachers do not have respect for the DHs. The issue of politics and authority may thus complicate the work of DHs as coaches.

Finally, additional monitoring and support were cited by four of the coaches as changes that would be needed for DHs to become effective coaches. Other changes needed for DHs to conduct coaching effectively, which were mentioned by just one or two coaches, were ensuring that DHs have the proper experience to be appointed to the position, providing recognition and praise to DHs, and providing incentives. Finally, but perhaps significantly, one coach noted the challenge of DH stability: “DH—it’s not the ultimate position that they’re holding. [When] posts are advertised, [like] principal posts, deputy principal posts, DHs would want to move and go to those positions”; thus, one major challenge of giving intensive training to DHs may be that the DH role is often viewed as a step toward higher-level positions as opposed to a long-term position in itself.

- **What are teachers’ perceptions of the value and quality of support from SAs? DHs? External coaches?**

A majority of teachers stated that the external coach was in the best position to give them the support needed to improve their teaching practices. Teachers focused on coaches’ ability to help them with their instruction specifically. As one teacher explained, “Because the coach comes to the class, the coach guides you ... they are the ones whom I have seen coming to the class, they are the ones whom I’ve seen myself sitting down with them, doing the work together, sharing information together, maybe when I present a lesson they are the ones that correct me when I am wrong and give me the right things to do, but the subject advisors we have never seen them in class, they do not come to check the activities of the learners. That is from my point of view, then they give feedback and a review.” A second teacher explained that “I think it is the coach because—although even if we have DH as the special advisor, I think it is the coach—he helps me to improve my teaching practices ... Because after the workshops that I have attended, I can see how I have improved the way I teach.” As noted, coaches have the luxury in their work of focusing less on administrative and other issues and primarily on working with teachers to implement new teaching practices; it seems that teachers both notice and appreciate coaches’ ability to focus on instructional issues.

When asked about whether receiving visits from the SA has impacted their teaching, four of the eight teachers interviewed said yes. One of the teachers replied with strong praise for the SA, saying, “I have improved because every time when I get that feedback then I know which areas to go back and improve, areas of improvement and also I get to assess myself on the platform as well after the classroom observation or whether it’s the classroom I get to gauge myself in terms of seeing how I’m doing and what is expected of me so I get to analyze myself.” This response, which was given by a teacher who had received classroom visits from an SA, is focused on improvement in teaching practices, similar to other teachers’ descriptions of coaches; this shows, again, that there seems to be variability in what SAs do in practice and therefore in perceptions of the nature and quality of the support they provide. A fifth teacher noted that visits from the SA have “[had] an impact, but not so much ... I think it has [had an impact], but it will be more [when] they come to our school, they can visit us in classes, so that they can see what we do.” Teachers seem to want support directed at improving instruction—from the evidence provided, they are open to visitors in their classrooms and feel that this kind of targeted support is helpful.

Teachers largely did not speak negatively about any of the support they receive and seemed generally open to support in different forms. However, teachers spoke with the most positivity about external coaches. Because the teachers were unfamiliar with the interviewers and were asked to speak about their superiors, it is unlikely that any of them would have felt comfortable saying anything too critical.

- **How do external coaches view the support they receive from SAs?**
- **What are coaches’ perceptions of the value and quality of support from SAs?**

While SAs’ views of coaches tended to be quite positive, coaches expressed mixed feelings about the SAs they had worked with. Coaches were asked about what kind of impact SAs have on their jobs. Specifically, they were asked, “Do SAs make your job easier, more difficult, or have no impact on your job?” The most common response was that it depends. As one coach explained, “They are human beings. There are those who are difficult, there are those who are friendly and able to work with people, and there are those who think we were taking their job so they would be negative.” Eight of the coaches noted that it depends on the individual. Another two coaches stated that it changed over time—that SAs tended to be difficult at the beginning of the projects he had worked on but that the relationship tended to improve over time. One coach explained, “When we start, the subject advisors are usually up in arms, like, ‘No, uh uh uh, no, no, no, no, no, no, we don’t want it like that.’ But as I say, we also train them. So after some time, they come around ... And you know subject advisors, at the beginning, I think they thought we wanted to take over the job, I think that is why they were so resistant.” Five of the coaches reported that SAs made their work more difficult. One of these coaches stated, “Subject advisors never made my job easy. We were always clashing. Anyway, not with all of them. We had a few who supported us who worked together with us and it was easy when we worked together with subject advisors. But some it seemed as if we are taking [their] jobs.” Interestingly, at least from coaches’ perspectives, there may be an issue around SAs worrying that coaches will take their jobs.

Six of the coaches interviewed expressed the feeling that SAs had a positive impact on their work or made their job easier. One coach explained, “The subject advisors they are making my jobs more easier because akere [isn’t it] ... we are talking the same language.” Another coach described SAs’ positive impact, saying, “We do relate to subject advisors. We collaborate very well with subject advisors like because we understand that they have a voice of authority. So when [we’ve] ... supported the teacher several times and the teacher is not coming to the party, we do report to the subject advisors to make sure that the teachers are doing what they’re supposed to do.” This quotation showcases how SAs’ authority can potentially feel positive for coaches when there is a good working relationship between the two.

Finally, one coach mentioned that SAs had no impact on their job, while three coaches noted that they didn't really know because their interactions with SAs were limited: "Actually, in the schools that I had visited, there was never a time when I was there and the subject advisor was there" and "I haven't experienced, I have not experienced coming across the subject specialists."

Coaches were also asked to discuss the kind of support they think SAs provide to the schools they work in. They characterized this support to schools and teachers in a variety of ways. The most referenced task was checking learner books, with 9 of the 24 coaches interviewed noting this as a task that SAs perform when visiting schools. As one coach stated, "Oh, when they get to a school, unlike us, they don't sit—you know we sit in classrooms and observe teachers teach, so that we can be able to guide them. So, what they do, they monitor ... they take the learners' books, go through the books ... That is basically what they do. And they also train teachers, they also have their own training sessions. Because remember we are not working in all the schools." Another coach noted that although she didn't know much about SAs' role, she knew that checking learners' books was a part of it: "Really I cannot tell you much as I'm not familiar with their job description. What I can tell you is that at least I have seen that the subject advisors checked the books." Three other coaches expressed a similar sentiment, noting that they don't really know what SAs do when they get to schools. The other most commonly mentioned tasks were checking policy implementation and compliance (6 out of 24), checking teacher files (5 out of 24), and conducting workshops, trainings, and meetings (5 out of 24).

While, as discussed earlier, some of the SAs defined their work as "coaching" (4 out of 9), coaches never described SAs' work in this way. Instead, coaches referred to monitoring (6/24) and even support (2/24) to describe the work of SAs. One coach explained, "We do coaching, they come for monitoring and support ... we go to classroom[s], sit down and observe ... With them, they come, they get into the office, they get learners' activities, they see them and they just monitor ... the curriculum coverage. And analyzing results. They don't get into classes and observe, just like us. They don't do that. They only monitor and ... give teachers feedbacks, and that is that." Another coach stated, "I wonder if the support that the subject advisors give to the teachers is just to do their monitoring—basically. Like yesterday when the subject advisor was there, she was doing monitoring. I'm not very sure what was she was doing? You see that. Because if there was that open-door relationship, she would be saying to me, 'I was monitoring ABC XYZ. And these are my findings. Can we work together to close these gaps?'" This quotation reflects not only the perception that this coach has about the work of the SA but also the tense relationship that the coach seems to feel exists between them.

Why do coaches seem to feel unwelcome or to perceive a tense relationship with SAs, even though SAs largely praise coaches' work? There is an apparent disparity between how SAs discuss coaches (using words like "magnificent") and how coaches feel about SAs. Because no interactions between coaches and SAs were captured during the observations, there are no data around what these interactions look like in practice. Perhaps, as has been found with teachers, coaches' perceptions are impacted by the notion of SAs as inspectors and fault-finders—perhaps even from coaches' own teaching days. Or perhaps there is resistance among SAs to coaches and coaching interventions that SAs did not express in their interviews. Perhaps it just depends on the individual—in other words, some SAs are difficult for coaches to work with while others are helpful. However, it is interesting to note that when asked about their personal relationships with SAs, 14 of the 24 coaches mentioned having a positive personal relationships, while seven were neither positive nor negative. Only one coach discussed a negative incident.

### ***Differentiating between coaches and SAs***

At various points in the interviews, coaches discussed the differences between coaches and SAs. In the words of one coach, "You will say to the teachers, 'When I come back'—looking at the lesson observation you will pick up some gray areas. Now you will say to the teacher, 'When I come back, you must improve this and this, so that when I come back, I will look at this area so that I can see the improvement.' Remember, as the coaches we are there for the classroom lesson observation, looking at the classroom observation also. Now we want to see the teachers implementing our resources as they have been trained. Now you will say to them as [DHs] that you know what, the Setswana subject head, 'When I come back next time, together with a teacher, I just want to see your reading corner. So can we be able to assist each other to develop the teaching corner?' Now they—the subject advisors—will come [and] maybe they will not even look at the teaching ... because the purpose of the subject advisors, they are not there in the classroom. They only go to the office. They will call for the teachers' files, they will monitor and moderate in the deputy principal's office, not going to the class. But now the coaches will go to the class. The subject advisor does not go into the class. So ... they don't know what is happening in the classroom situation ... especially classroom-based activities, they don't understand. The only thing is that they only moderate the teachers' files, giving the report and doing the manual, tick, tick tick. But as a coach, I'm here to check what is happening inside the classroom, the subject advisors they don't know what is happening in the classroom."

Another coach highlighted that SAs do not conduct classroom visits in the same way as coaches, saying, “When they visit at the school, they will ask for the teacher’s file, the learners’ books, then they sit in the staff room. Then they check, they control the books, they control the books. From there, they write a report and they call them. So, it’s totally far different from the coaches, because we coaches, [on a] weekly basis, we visit one teacher, or three teachers in a school in the classroom. After this, we reflect on what happened in the class. If there’s a gap, we make them aware of the gap, even if those that we didn’t visit, we gather all of them, so that they must already learn from the other person’s visit.” A third coach explained the difference between coaches and SAs in terms of “quality and quantity,” explaining that “we are focusing on quality, quality learning ... and teaching. Then, it is like they are focusing on quantity, the number of activities that they have, the teachers have to cover. They just go to school and count the activities that have to be in the learners’ books. So, we are making sure that the learners understand the content and it’s drilled, drilled, drilled and then, so that when the learners write in their books, they write something that they understand.” Interestingly, while these kinds of comparisons were frequent in the interviews with coaches, they did not emerge in the interviews with SAs.

Finally, two coaches who were both former SAs took time to explain what they have experienced as the difference between SAs and coaches. One of them stated that “there’s a difference between being a coach and being the subject advisor talking from experience. Being a subject advisor you would give out the marching orders that you are given by your seniors, to relay that to the teachers, the guidelines and everything. And you will be there to gather the information whereby you only focus on the challenges and prepare for having challenges to maybe have a workshop with them. But as for coaching, this is very different and I really like coaching. For starters, you become a critical friend with these teachers. They don’t see you as a monster or they don’t see you as somebody who is there to find fault, but there as somebody who is there to support and close those gaps that they’re having, you see. So, it’s—I don’t know how to put it for lack of a better word—it was a good experience, it changes the life of teachers and learners.”

The other SA-turned-coach said, “But the teachers tried to relate to subject advisors as inspectors. They come and inspect. ‘What is it that you are supposed to do? What is it that you haven’t done? Go and do this. I want this done this way.’ But with us, we saying, ‘Okay, what is it that you have done?’ The teacher has to show you. That is our starting point. Let me see how you deliver that. Can I check whether you have challenges? Relate with me as your friend, as your critical friend. If you are encountering problems or you have challenges in terms of a certain concept, can I demonstrate to you how this can be done to improve this and then you relate—you give the teacher feedback as well. Positive feedback and developmental feedback. After observing a lesson. From thereafter, you ... set goals as to when are you going to improve this by the next visit, I expect you to have improved because I have demonstrated this to you. And then next time when I come again I expect to see improvement ... But with the subject advisors—because I was one—unfortunately, we just didn’t get a chance to like demonstrate if a teacher had a problem. And ... we just checked compliance. The teacher had to comply. If the teacher didn’t comply, you write a report, then you tell the teacher, ‘I want this to be done.’ You only meet them during training again because subject advisors basically they are thinly spread. There’s a lot—they have many teachers and many schools at their disposal.” Both of these quotations not only illustrate some of the major differences between coaches and SAs, according to individuals who have served in both roles, but also show further evidence of the language of “critical friend.”

As the previous quotation notes, SAs “are thinly spread.” Several coaches noted that SAs face major constraints on their time due to their heavy workload of schools and teachers. One coach stated, “I wish subject advisors would have less on their shoulder so they could do more intensive support and monitoring.” These time constraints served as an explanation for some of the major differences described by coaches between themselves and SAs. As one coach noted, “So again, it depends on the subject advisors. I think a lot of subject advisors have a lot of schools that they have to support and they don’t get to them as often as they would like to. But I do know that they do have trainings and things like that, and I’ve heard from some of the coaches that the trainings that the subject advisors are doing are very closely linked to the lesson plans that we have given and have trained them on. But as far as supporting the schools, I think it’s very difficult for them. So, they just want to go in and check that everything’s being done, and they want to check the learners’ books, and they want to check the amount of written work that’s in the learners’ books and things like that. I don’t think they really have time to be a support system for the teachers, which is why I think coaches are so important.”

One coach stated with empathy that “subject advisors, unfortunately, they are so overworked, I don’t want to lie. I would really like them to be more involved in what we are doing. But unfortunately ... one subject advisor [is], you know, monitoring 150 schools. I mean that’s humanly impossible. So, while they are interesting and while we try to take them along, we don’t really get to spend enough time with them. Like we always invite them when we train teachers, but they seldom have time to attend, because they have to go there, they have to do this, they have to do this. And that is the only thing that I would really like the department to improve, to reduce the load work of subject advisors. Because even they themselves, they don’t really get comfortable in terms of monitoring in the schools. In some schools, they will say they haven’t seen the subject advisor in the past four years. And you can’t blame them. Because it’s too much.”

Overall, coaches feel that they are better equipped than SAs to support teachers. The data also show that coaches seem to feel the need to differentiate themselves from SAs—perhaps because their jobs are contingent on funders seeing their role as necessary.

- **How do DHs view the support they receive from SAs?**
- **What are DHs' perceptions of the value and quality of support from SAs?**

The DHs interviewed expressed receiving support from both the SA and the coaches. One DH explained, “I feel the subject advisors are there to assist, and the EGRP is always there to assist wherever necessary.” In other words, the DHs seem to feel that they receive valuable support from both roles. It is interesting to consider that at least four of the nine SAs and five of the twenty-four coaches interviewed were previously DHs at some point in their careers; DHs may feel that the role of coach—or, more likely, the role of SA—are potential next steps in their careers. This could impact how they perceive people serving in these roles. In turn, it is important to note that people who thrive in the DH role—whether because of their pedagogical or management skills—may be more likely to leave their DH roles for SA posts or external coaching jobs.

When asked about their relationship with the SA specifically, the DHs spoke positively. One of them explained, “I think the relationship with the subject advisors are also good and whenever I’ve got problems with them, they’re also approachable because I can call them at any time. Like yesterday, I spoke to them to say ‘I’ve got a problem’ because I was supporting another teacher the other time and we had some sort of a misunderstanding, there were some things that we couldn’t agree upon so I called the specialist.” This quotation illustrates that the SA can act as a back-up system for the DH. Interestingly, one of the teachers interviewed noted that when she approaches the DH and the DH cannot answer her question, the DH will call the SA; in the teacher’s opinion, this showed a lack of expert knowledge of the DH. It is unclear exactly what caused the DH to phone the SA in this context, but it is interesting to consider how other teachers may perceive this. Another DH explained, “Our relationship is mutual., We have a mutual relationship because she was my [DH] at the previous school where I was. So, she usually used me. I was taught by her to monitor because when I was still a [teacher] at [school], she allocated life skills and English for me to moderate.” In this case, the DH and SA seem to have known each other and worked together for years. The third DH described both the SA and coach when asked about her relationship with the SA. She said, “The subject advisors, they are good, they are good. Especially Mrs. coach, when she is at the school she will support me, and maybe if I have some problem regarding the educators she will talk to them just to reinforce certain things.”

DHs were then asked about the kind of support they receive from the SA. One DH explained, “We get the Zoom meetings with them, we have got a WhatsApp group, when we’ve got problems to communicate with them through WhatsApp. We have those. Now lately we are going to have reading competitions that we have to do amongst the schools and they are supporting us, they come in to check us, before I go to the classes of the teachers, she comes to check, go with me to the class to check, sort of shadowing me as to check if I am doing the right thing that the kids are supposed to be getting.” It seems that SAs may be taking advantage of the increased usage of technology that occurred during the COVID-19 pandemic to be more accessible to their teachers.

When asked who provides them with the most support to do their jobs, DHs’ responses were mixed. One said that it was the EGRP coach: “The EGRP specialist, she’s the one who is most useful because whenever I’ve got a problem or whenever I encounter problems with the kids in the class, she’s only a phone call away. I’ll be asking. As well as the [WhatsApp] group, we usually discuss on the group and when you struggling to get some answers from the group, I’ll be calling her on private to say Ma’am ... you know sometimes you will be shy to [ask] from the group and then I’ll be talking [to] her one on one and she is always available to assist.” The other DH said that both the SA and the EGRP coach were the most supportive, as well as the deputy principal; and the third DH stated that it was her principal. Clearly, DHs feel that the SA may be an important source of support but not the only one.



## Research Question 4

**Can SAs be effective instructional coaches? If so, what would need to change for SAs to take on this role? What are the barriers and enabling factors?**

- **How would SAs' formal job description need to change for them to be instructional coaches?**
- **What other, informal changes would need to occur?**
- **Does this seem possible? Why or why not?**

The research sub-questions in this section are broad questions to be considered based on the data gathered in this report. SAs were not asked outright their opinion on whether they can do instructional coaching; indeed, the data above indicate that SAs do not have a solid understanding of what coaching actually entails. Instead, the data in this section represent conclusions made based on comparing answers of SAs and coaches to other questions. For example, in order to gather information about the formal and informal roles of both external coaches and SAs, both groups were asked what it is like to do their job, and to define their roles. In order to understand whether SAs could effectively perform the work of external coaches, it is critical to understand how these roles are similar, how they are different, and how people in these positions define their jobs.

Both coaches and SAs frequently used the word “interesting” to describe their jobs, but overall, coaches seemed to speak with more positivity about their jobs. Whereas coaches tended to describe their jobs as interesting and fulfilling, SAs were more likely to describe their jobs as interesting but challenging. As one SA responded, “To be a subject advisor, I’ll say it’s good. And it’s also not that good.” Another said, “It’s very interesting. Again, it’s very challenging.”

Out of the nine SAs interviewed, seven (77%) referenced experiencing a significant challenge in their work when asked this question. The major difficulties noted were a high volume of schools, transportation issues, communication issues, and teacher compliance. One SA explained, “It is interesting to be a subject advisor except for some challenges we came across. [Interesting because] we meet different teachers. The challenges: one, transport; two, communication, because we communicate with our cell phones, and we don’t receive data. If I do not have data and I have communication from different levels, I cannot receive the information on time. That is the main challenge. We report through our cell phones. We don’t have data, sometimes transport, we can go almost three weeks sitting in the office.” Another SA reflected that “I like working with the learners, with the teachers, but the pressure is too much ... The pressure—we are expected to conduct 15 school visits per month, and the transport is a challenge, and I have to account if the results are bad.” Both these quotations illustrate the general sentiment among SAs that their jobs are interesting but that they encounter significant challenges in their work. Again, as discussed in reference to research question 1, resource constraints seem to play a role in how SAs feel about their jobs.

While one SA mentioned having passion for their work—noting, “I do have passion, because I want to help teachers where the support is needed”—this was the only instance of the word being used by an SA in the interviews. In contrast, many of the coaches interviewed (7 out of 24, or 29%) used the word “passion,” in addition to a variety of other words connoting the passion they have for their job, including “making a difference,” “helping,” “rewarding,” “change agent,” “changing lives,” “fulfilling,” “critical friend,” “beautiful,” “uplifting,” “motivate,” and “inspire.” Even one of the fieldworkers used the word “passion” to describe the coaching she observed: “She appeared to be very passionate and committed to her coaching duties. The teachers and principal speak highly of her, and she engaged well with the learners who also seemed comfortable with her.”

One coach explained her work as a coach, saying, “It’s so exciting. You know it inspires you so much going to school, knowing that you can assist the teachers with whatever they are facing.” Similarly, another coach reflected on her excitement for her job, noting, “It’s exciting. It’s exciting. Now I have goosebumps as you say that. You know, we want our children to change. We want South Africa to change. Who is there to come and change South Africa for us if we’re not there, if we don’t do our work. So being a coach, changing a life, seeing a smile on a child’s face to say, ‘Wow, now I think I can read and everybody thought I can’t read,’ and the teachers as well, you know, we try to make them feel confident.” As is characteristic of many of the coaches’ responses to this question, there is a strong sense of excitement, love, and even reverence for coaching.

One coach described her coaching experience as “difficult at times, but probably the most rewarding job that anybody could do in education ... I’m working with a lot of teachers and thousands of children and I’m helping to improve the education of a lot of different children in different quintile schools. But yeah, it’s probably the most rewarding job. I love my job.” Here, although the coach mentions the word “difficult,” she gives a glowing description of what it is like to be a coach. Of the 24 coaches interviewed, 19 (79%) discussed their roles in a similar positive light. While interviewees used a wide variety of terminology, they all shared the idea of positively impacting teachers, building relationships, being a trustworthy source of help, and positively impacting learners.



Of the five coaches whose responses were inconsistent with this highly positive tone, only three of them discussed the challenges related to coaching. Interestingly, these challenges related to structural challenges or challenges faced by teachers rather than challenges in their own work as coaches. For example, one coach explained that “being a coach is an interesting job though a bit challenging at times. It requires a lot of willingness, a lot of sacrifices and a lot of, you know, you need to be emotionally strong if you’re a coach. Challenging because sometimes when you go to schools, you meet teachers who are frustrated by learners who cannot read based on maybe their backgrounds. The fact that there are no people who are helping them at home—even when they give them homework, [the learners] don’t do that. So you need to support them ... so that they can in turn be able to transfer that to learners, because a frustrated educator will give out frustrated learners.” Another coach discussed the challenges that teachers face with learner absenteeism, especially in rural areas.

These few examples suggest that coaches and SAs think differently about the challenges in their work, with coaches focused more on putting themselves, empathetically, in teachers’ shoes. This is in line with one of the coach’s assertions that “being an external coach is interesting because the most important thing that you have to start with is building relationships with your teachers. That’s the first thing. And then you have to exercise empathy, put yourself in the peoples’ shoes.” This is in contrast to the challenges discussed by SAs, which, broadly speaking, were focused on the work of SAs themselves and more specifically on resources (particularly transportation) and workload.

Overall, SAs and coaches seem to feel quite differently about their jobs. SAs seem to feel much more challenged and less fulfilled in their work than coaches do. This points to a key informal change that may need to occur for SAs to do the work of instructional coaches. SAs are more preoccupied with the barriers that make their jobs difficult, as these barriers have a significant impact on their ability to support teachers, coaches, and DHs effectively. Coaches, meanwhile, seem far more equipped with the resources that they need to be successful in their work and have a more reasonable workload that allows them to feel successful in carrying out their job.

However, the language used by SAs and coaches points to more than just the different challenges faced. First, as explored earlier, the words that coaches use to describe their work are largely consistent across individuals, suggesting consistent training across interventions. Further, coaches’ language suggests that coaches are encouraged by their employers in similar ways: they are consistently told that they’re in schools to make a difference, that they’re change agents, and that they have an important job to help teachers and improve education. While SAs’ interview responses suggest that SAs are supposed to fulfill their (mundane) duties, coaches’ responses indicate a need to help teachers and to make a difference in the lives of learners.

In addition, perhaps because of the issues of power and authority discussed in the next section, coaches’ ability to effect change is likely dependent on their ability to influence and motivate teachers through the relationships they build. Whereas SAs can force compliance through authority and even fear, coaches cannot, due to their positioning in the system. Perhaps the relationship building that is central to the work of coaching impacts how coaches feel about their jobs; this relationship building may mean that teachers are generally happy (and not scared) to see their coaches and are appreciative of their visits.

#### • **What factors (relational or administrative) enable or impede SAs’ support to external coaches?**

SAs were asked about the support, if any, that they provide to coaches in their schools. Four SAs explained that they attend trainings run by coaches—a form of support that was confirmed by several coaches who noted that SAs do come to their trainings. SAs also stated that they check the materials that coaches use for CAPS compliance (two SAs), that they assist with logistics and materials distribution (two SAs), and that they use their authority to help coaches (two SAs). Although this point around authority was explicitly stated by only two of the SAs in answering this question, the theme of authority and compliance came up both in SA interviews and in coach interviews in various ways.

One of the SAs explained, “Even if [the coaches] experience some challenges in terms of teachers not doing their work, they call us. They are free to call us, and we go there as subject advisor to help.” This quotation illustrates how SAs may support coaches as a result of the authority they hold. Several coaches indicated feeling supported by this, with one coach stating that “we collaborate very well with subject advisors like because we understand that they have a voice of authority. So when [we’ve] ... supported the teacher several times and the teacher is not coming to the party, we do report to the subject advisors to make sure that the teachers are doing what they’re supposed to do,” and another observing that “we do, we do collaborate with them and report issues ... we encounter challenges with, so that they can sort them out. Because they have authority over teachers, we don’t have authority over teachers. So they can take steps.” It is clear from these quotations that these coaches have a keen understanding of the power dynamics between SAs and teachers.

In addition, some of the comments around SAs attending coach trainings suggest that having an SA at an external training is also a way for the SA to lend their authority; in other words, having an SA at a training could help lend weight and legitimacy to the trainings given by coaches. One coach described this support, saying, “And when I do have exceptions maybe from that teacher who is not there, who’ll come up with—you know, [the SA] stands and says, ‘But ma’am you hear that the coach is training.’ So, actually I had a good relationship with my, subject advisor ... she didn’t facilitate but when I feel you know what, I try to explain this but the teacher doesn’t really—I just say ‘Ma’am, please help. Are we on the same page?’ And then she’ll say yes, we are on the same page, ... let us take it this way.” On the other hand, SAs may also use their authority to undermine the work of coaches. In this regard, one coach explained, “When we go for our training, we go with them, they are always invited in our training, so that we must speak the same language in schools but after training, they become something else because they change. So, they’ll tell the teachers that, you know, we are just waiting for this program to end, and then you must throw away everything that you are using now. We don’t want to see this program anymore. That’s what they are telling—they’re not supporting them. Instead, they are humiliating them.”

Interestingly, while coaches seem to perceive that SAs have the authority to ensure teacher compliance and feel frustrated at their teachers’ noncompliance in certain instances, three SAs also expressed frustration over teacher noncompliance. One coach stated that they disliked their job because “teachers, they will just be preparing for the visit. And then, they will give you what you want to see by that time. And then when you leave ... they just relax.” In other words, teachers perform for the coach but do not do the work of implementation when the coach is not there to watch. One SA similarly explained, “We workshop [teachers] year in and year out. But when we visit them to their schools to monitor the implementation, they will tell you so many stories that they are unable to teach, group guided reading as it is expected. So, some are trying, some are just saying hey, it’s too much work.”

One example from the observational data of SAs exercising their formal authority is their frequent checking and signing of teacher files and learner books. During observations, 100% (4 out of 4) of the SAs in the intervention schools were observed signing and checking documents. Coaches, on the other hand, were not observed doing this, and in their interviews they never discussed signing books; their only form of documentation was filling out lesson observation forms created by their service provider. By checking and signing documents, SAs show that they have the authority to oversee adherence to DBE policies like the CAPS curriculum. It is critical to note that SAs, in their capacity as government officials, are explicitly there to ensure not only that teachers follow department policies but that coaches adhere to these requirements as well.

Ultimately, while SAs have authority, this power may also serve as a barrier in certain ways, as it can create the perception of their being an “inspector” and can inhibit openness, honesty, and relationship building. Coaches, on the other hand, must figure out alternative ways to influence and motivate the teachers they work with. As one coach explained, “If a teacher is not complying, [the SA] can just say, ‘I’m going to give the written warning, or a final written warning.’ We don’t have authority over teachers ... All we do is just to motivate them to work better and to perform well. So with the subject advisors, the department, they do have those disciplinary measures that when you are not complying, they apply those actions.” Rather than enforcing compliance, as SAs can do, coaches must try to motivate teachers by building strong relationships and showing their expertise and confidence—often by giving lesson demonstrations on an as-needed basis—which has the potential to inspire teachers to believe they can improve instruction in their classrooms.

- **What factors enable or impede SAs’ support to DHs?**

The same factors that impede SAs’ support to teachers are likely to impede their support to DHs; the same barriers apply as discussed above.



## Conclusions and Recommendations

This study provides evidence that neither SAs nor DHs are in a position to effectively conduct instructional coaching in South Africa in their current form without substantial shifts. External instructional coaches have been hired for various interventions based on anecdotal evidence and assumptions that the formal monitoring and support systems within South Africa's education system are insufficient. This study provides significant evidence to support these assumptions. While there may be a theoretical space for SAs or DHs to serve as sources of instructional support for teachers, this study shows that the consistent, classroom-level support needed for effecting instructional change exists on paper only and not in practice within the education system.

It is necessary and desirable to strengthen institutional capacity to provide teachers with ongoing professional support. While DHs and SAs may seem to be the most conveniently situated actors in the educational system to take on teacher coaching and support functions, it is unrealistic to place further expectations on these actors without addressing the relevant constraints. The assumption should not be that just because certain actors are conveniently located that they can necessarily refocus to take on supportive functions. This study finds that there are both big and small barriers to both DHs and SAs taking on instructional coaching roles:

### Small Barriers

The barriers discussed in this section represent the “low-hanging fruit” in that they can be dismantled with relative ease. However, solutions to these barriers, while necessary, are unlikely to be sufficient on their own for securing the meaningful change needed for SAs and DHs to effectively deliver instructional coaching. These will need to be put into place as first steps and as prerequisites for effecting meaningful system change.

#### *Transportation*

Transportation is a small but necessary barrier to address to enable SAs to take on instructional coaching roles. (DHs, unlike SAs, are based in schools and thus do not share this challenge.) The SAs interviewed for this study frequently cited transportation as a key impediment to carrying out their core function of being in schools. While some SAs have to carpool with other district officials and are affected by shortages of government vehicles, others must pay out of pocket for their transportation expenses by necessity. Coaching requires consistent, face-to-face interactions between coaches and teachers. If SAs cannot get to schools, they simply cannot deliver instructional coaching. To overcome this barrier, the DBE should ensure that provincial departments of education are adequately resourced, either in terms of additional departmental vehicles, or providing a transparent system to reimburse SAs for their use of private vehicles when necessary. Transportation must be considered a basic and fundamental part of the job and be budgeted for accordingly.

#### *Lack of standardized tools*

Another finding of this study is that neither SAs nor DHs have a standardized tool to help guide their classroom visits. Despite SAs using tools provided by previous interventions, there is no consistency in the tool that is used. Standardized tools are more than a formality—they represent a protocol for conducting visits. This protocol can help embed best practices, ensure consistency across time and space, encourage transparency, and ultimately help build trust between coaches and teachers. While SAs reported that they often must make their own tools or use tools that other people have shared with them, DHs did not mention having any kind of tools that help guide their coaching work. This stands in stark contrast to external coaches, who were routinely observed using the same standardized tool to guide their coaching visits. While a standardized tool is not sufficient for ensuring that SAs and DHs can make the same kind of impact on teachers' instruction as external coaches, they must have access to such a tool in order to ensure a basic, consistent structure for their classroom visits as a first step to carrying out coaching with expertise.

Further, it is critical to consider additional resources that are needed for SAs and DHs to effectively coach teachers. It is important to remember that in South Africa, coaching has been shown to be an effective mechanism for change in the context of a triple cocktail model (Fleisch, 2016; Fleisch & Alsofrom, 2022)—not as an isolated intervention. The Zenlit study, for example, demonstrated that coaching without the provision of structured learning programs has limited effectiveness (Hofmeyr, 2019). In other words, for SA or DH coaching to be impactful, the DBE would need to provide SAs, DHs, and teachers with standardized teaching and learning materials in addition to standardized tools for classroom observations. This is an additional barrier, particularly since resources already seem to represent a constraint within the formal education system.

Carrol et al (2019) note that in the case studies reviewed (Jordan, Malawi, Uganda and Nepal) all projects provide curricular materials like teacher's guides and learner books with the aim of supporting schools and teachers. In addition, there is mention of the development of protocols and guidelines for supporting the implementation of these materials. While it is not clear what kind of curricular materials or support tools existed prior to the interventions discussed, the report makes it clear that a variety of different countries have gone through the process of developing materials for standardizing instruction and instructional support at scale.

For example, in Malawi, all materials developed with the support of MERIT become official required curricular materials. In addition, there is evidence of the 11,000 section heads who were trained providing support and coaching to their peer teachers using the aligned tools and guidelines provided through MERIT. On the other hand, while teacher guides developed as part of LARA in Uganda form part of the national curriculum, the classroom monitoring tools developed through the program are reportedly used inconsistently by the Coordinating Center Tutors (CCT) who were trained to provide coaching and teaching supervision in the system. Developing standardized tools and protocols does not guarantee consistency, but it is a step in the right direction (Carrol et al, 2019).

### ***Lack of standardized job descriptions***

Standardized job descriptions for SAs and DHs that aim to refocus their jobs toward supporting teachers and away from some of their administrative work are another necessary first step for integrating instructional coaching into the education system. Creating more standardized job descriptions would require the DBE to carefully consider the desired functions of SAs and DHs. Depending on the extent to which these new job descriptions are controversial or contested, this small barrier could cross into the realm of a big barrier. Once this is written down, new job descriptions represent a commitment to change. However, a formal commitment on paper will not be sufficient for SAs or DHs to deliver instructional coaching. For these standardized job descriptions to be meaningful, big barriers (discussed below) would ultimately need to be addressed as well.

Numerous countries have had success in revising job descriptions to formally shift roles away from inspection and towards support. In Jordan, as part of the RAMP project, MOE supervisors' job descriptions were revised to align with suggested provisions of coaching support to teachers (Carrol et al., 2019). In Kenya, TAC tutors were renamed Curriculum support officers (CSO) as their responsibilities were revised towards a teacher support function and away from an administrative function (Piper et al., 2018). In Uganda, as part of the Learning and Retention Activity (LARA), job descriptions have been revised for various actors in the system including CCTs and head teachers with the intention of orienting the system towards one that provides instructional support through coaching and mentoring rather than one focused on basic compliance or inspection (Carrol et al., 2019). While this exercise has taken place in multiple countries, there is not yet an abundance of evidence showing how successful these job descriptions have been in shifting system realities in practice.

## **Big Barriers**

The three barriers described below are much more significant than the ones identified above and would require major system-wide interventions in order to be effectively addressed. While these barriers are complex and difficult to address, they are essential pieces of the puzzle that must be put into place if SAs and DHs are to effectively serve as instructional coaches.

### ***Lack of time***

One finding of this study is that SAs and DHs face time constraints that external coaches do not. Coaching requires a significant time commitment. Instructional coaching requires a safe relationship in which lesson observations and feedback sessions occur regularly. In South Africa, external coaches' only job is coaching. They do not have a variety of other administrative duties to fulfill, and they seem to benefit from a different type of accountability relationship with their employers in which there are virtually no resource constraints. In other words, coaches are provided with the time and resources needed to effectively carry out their jobs—a luxury of working for shorter-term, externally funded educational interventions with strict dosage requirements.

In contrast, DHs and SAs must grapple with heavy workloads that stem, in part, from a lack of clearly defined job descriptions, confirming the results of past studies such as the DBE's *Subject Advisor Profiling Study* (2020). While SAs are often assigned an unrealistic number of schools and teachers to visit, DHs' heavy workloads and administrative responsibilities mean that they have little available time to observe teachers in their classrooms and provide feedback on issues of instruction, despite being located in schools and having close proximity to teachers. Thus, SAs and DHs would need to have their workloads significantly reduced, in addition to having their roles clearly defined, in order for effective coaching to occur.

For SAs to provide support more effectively to teachers in their classrooms, there need to be major reductions in the number of allocated schools and teachers – a straightforward issue to address, but given the rates of vacancies that already exist, not necessarily an easily solvable problem. In addition, standardized job descriptions would need to help in the refocusing of their SA KPA's towards the instructional support of teachers and away from administrative tasks.

Under the EGRP's "DH coach" model, DHs are expected to teach their own classes (nearly full time), monitor and check files (as SAs do), and spend time learning to conduct coaching visits. In EGRP intervention schools, DHs are asked to add coaching to their repertoires, without any duties being taken off their plates. In other words, these DHs are largely expected to take on the monitoring that is characteristic of the SA role *and* the support central to the coaching role. This represents a serious challenge for DHs in terms of both time pressures and the more affective requirements of instructional coaching. The piling on of duties inhibits possibilities for coaching that is focused on instruction and strong supportive relationships. This seems unsustainable—ironically, when the goal of such an initiative is, in fact, sustainability. For DHs to effectively support teachers around instruction, a reduction in workload needs to occur. One of the coaches in the present study suggested that "perhaps DHs could be provided with skilled teaching assistants to give them time to support teachers." Perhaps teaching assistants (skilled or even unskilled) could ensure DHs are able to utilize the 3% of the time they are allocated for DH duties to observe other teachers in their classrooms. However, this may have budget implications that render it impractical.

### ***Lack of training and support***

Another finding of this study is that while coaches appear to benefit from consistent and comprehensive training on what it means to be a coach, SAs and DHs do not have access to the same kind of ongoing, intensive, and targeted training. While this is a potentially solvable problem, both materials and systems would need to be developed to institutionalize ongoing, meaningful professional development for actors in the system. There are examples of this occurring at scale; for example, as part of strengthening institutional capacity, countries like Malawi have put into place systems for cascading trainings to all teachers. Indeed, even in a South African context, models of successful large scale cascade models exist; to date, over 40,000 teachers have been trained by SAs through the Primary School Reading Improvement Programme (PSRIP).

A majority of the coaches interviewed, for example, used consistent language to describe their role, which is likely due to the extensive training and communication that they receive regarding the coaching job. Service providers are generally invested in ensuring positive outcomes and thus are likely to provide dedicated and deep training for coaches to help them execute their jobs effectively. From the language that external coaches use, this training provides coaches not only with technical expertise but also with protocols for serving as "critical friends" to teachers and as nonjudgmental sources of support. In addition, the extensive and ongoing training that coaches receive appears to motivate them and affirm that their difficult work is making a difference and changing lives, fostering a passion and love for their jobs.

SAs and DHs, on the other hand, do not benefit from this same kind of training and capacity building. Further, SAs do not receive the same type of affirmation or support from their employers as coaches do. Instead of feeling supported in their work, SAs seem to feel a general sense of fatigue; for example, there was almost no discussion among SAs around making a difference or feeling passion for their work. Rather, they seem to be in a position of constant problem solving around issues of time and resources to complete the basic requirements of their jobs. And there is no one to positively frame these challenges for SAs as "making a difference."

While SAs face a variety of barriers to focusing on instruction with teachers, they seem to understand the importance of coaching. SAs' high praise of coaches is likely an indication that, on some level, they understand that coaching is both important *and* different from the function they provide. While some SAs believe that they are doing coaching, observational evidence and input from teachers confirms that SAs are not, in fact, coaching. Coaching requires consistency (ongoing, timely support), which SAs currently cannot offer to teachers—both because of time and resource constraints and due to a lack of training. As it stands, SAs do not have the time or capacity to serve as "critical friends." However, SAs' comfort with the idea of coaching suggests that there may be theoretical space for SAs to make a shift.

With regard to DHs, the major advantage of utilizing these actors for teacher support is their constant availability in the schools they work in. However, it is also important to remember that DHs do not necessarily have pedagogical expertise and may not be respected as instructional experts by other teachers in the school environment. While this could potentially be remedied with intensive training, the lack of training generally available to DHs represents a significant barrier. Further, because DHs operate fully within the school context, there is a possibility that internal school politics may impact their ability to be successful in building trusting, nonjudgmental relationships with all teachers. Perhaps, practically, there is more space for DHs to take on more of the monitoring and administrative duties held by SAs, thereby freeing up time for SAs to do coaching.

## *Issues of power and authority*

The theme of authority is another key issue that emerged in this research, particularly for SAs. Unlike coaches, who lack authority in the South African education system, SAs hold authority and can enforce compliance. While in some ways this formal authority is useful to SAs (and to coaches who seem to be able to leverage it when needed if they have good relationships with SAs), in other ways it may represent a significant barrier for SAs—especially with regard to providing coaching and support.

SAs are government officials who are in a position to evaluate teachers. The authority inherent to the SA position potentially has a large impact on how others (especially teachers) perceive support from SAs. As noted earlier, pairing instructional coaching with performance evaluation is problematic (L’Allier, Elish-Piper, & Bean, 2010; Hofmeyr, 2019); if teachers do not feel that instructional coaching is a supportive, safe space for learning, this may decrease the effectiveness of coaching. This may be especially true in the South African context, as visits from SAs may evoke memories of the harsh, oppressive, and racist inspections under Apartheid (Shalem & Hoaldehy, 2009). Thus, while SAs have the advantage of holding authority, the fear that may accompany their visits may inhibit the relationship building that is a necessary first step in the coaching process (Alsofrom, 2018).

In contrast, instructional coaches must earn authority by demonstrating their competence and confidence (e.g., by showing their pedagogical expertise through lesson demonstrations), and they must motivate and inspire teachers through emotional connections and relationship building. There are perhaps lessons that SAs could learn here from the kind of work that coaches must do to earn authority where it is not assumed. For SAs to effectively deliver instructional coaching, feelings and relationships need to be considered—something that is often absent in large-scale educational initiatives.

Importantly, in reconfiguring SAs’ (or DHs’) roles, the tension between support and authority needs to be considered. However, changing SAs’ job descriptions, reducing their administrative workloads, and even providing them with intensive and ongoing training may not serve to shift the authority that teachers (and coaches) seem to perceive as coming from SAs. Meaningful change will likely be a longer-term process, requiring teachers to have firsthand experiences with SAs that feel supportive and work to slowly shift how SAs are viewed in the system. This barrier is likely to be the most difficult one to address.

In conclusion, while it would be ideal for both scalability and sustainability if instructional coaching were integrated into South Africa’s education system, a variety of barriers currently exist that renders this impractical. Small barriers are more straightforward and simpler to address but are likely to be insufficient for securing meaningful change. Deep changes to the system to address the more complex, big barriers are required if instructional coaching is to become a priority in the system. By addressing these barriers, from small to big, there is potential for the South African education system to embed—from within—meaningful coaching support for teachers that ultimately leads to improved teaching and learning.

These barriers reflect findings from Carrol et al that “All country systems [Jordan, Malawi, Nepal and Uganda] are working towards having education support professionals whose main role is to support teachers, whether those professionals are school-based or district-based. Projects are supporting this move by working on job descriptions, developing tools and protocols, and training personnel” (2019, pp 20-21). In other words, the challenges South Africa faces are not necessarily unique; there are models available for overcoming some of the small and big barriers mentioned here.

It is important to note, however that the examples here are in early stages of implementation. While these models are recommended for consideration in terms of design and additional ideas, an evidence base is still being developed around what works to meaningfully strengthen system capacity in terms of teacher support systems. Of course, an independent evidence base needs to be developed to ascertain how viable and effective different systems of institutionalized coaching support are in supporting shifts in teaching and learning.

## **Further Questions**

While the present study provides some important evidence to help fill current gaps in the literature, it also elicits questions for further research regarding the change levers that would be needed for SAs and DHs to provide effective instructional coaching to teachers:

- What kind of language and messaging do SAs receive around their jobs, and how is this different from the messaging that coaches receive from their employers? Would providing SAs with a space for emotional support and using encouraging language make any difference in SAs’ feelings about their roles? Could more motivating, supportive language—without other substantive changes or training—make a difference in the way SAs view their work?

- What difference might a standardized tool make for SAs? How much impact would this kind of tool have without extensive capacity building? In other words, how much can a tool by itself impact the content of a school visit?
- External coaching seems to fill a gap that exists within the South African education system, in which coaching by education system actors is supposed to take place but is not happening in practice. It is critical to consider the extent to which it is desirable for SAs and DHs to change their practices or whether there are other, more effective ways of addressing this gap without potentially creating new gaps.
- Is there room for external coaches, SAs, and DHs to coexist along an intervention continuum? For example, what might happen if external coaches were considered “frontline” workers who take teachers (and even SAs and DHs) through an intensive intervention, while SAs or DHs were responsible for conducting long-term follow-up visits after this period of intensive coaching? In other words, is there potential for SAs and DHs to conduct “second-line” coaching rather than frontline coaching?
- Is DH coaching the best way to utilize DHs’ proximity to teachers, or is there a better way to take advantage of this proximity? What makes the most sense for leveraging this critical characteristic of DHs?
- Are there potential challenges related to intensively training DHs as coaches? For example, if DHs were to receive extensive coaching, would they want to stay in their roles as DHs, or will they be motivated to move out of schools and onto higher (better paid) roles?
- Is there an alternative way to institutionalize teacher support outside of DHs and SAs? For example, would creating a role like a senior teacher (like those utilized in Jordan) or resource teachers (one of the options in Nepal) – roles that are created for the purpose of instructional support and do not hold an administrative function – be a possible alternative to training DHs for this role? While these actors may face the challenge of a full teaching load, they would not have an additional administrative expectation placed on them. Perhaps this is more workable to create an instructionally focused position and allows certain teachers to spend time becoming school-based content experts, since the training is needed regardless of who fulfills this role? Are there possibilities for incentivizing people to take on this kind of role, and what would the budget implications be?
- What lessons can be learnt by looking at other countries’ efforts to strengthen capacity for providing teacher support as part of the system? Are there other models that can help provide additional considerations and / or design features that are appropriate for a South African context?
- The Primary School Reading Improvement Programme (PSRIP) is a national scale structured learning program initiated by the Department of Basic Education (DBE) in 2016 and implemented through the National Education Collaboration Trust (NECT). Since 2016, 422 FP SAs and 221 Intermediate Phase (IP) SAs have received ongoing professional development through this programme. Are there differences in language, knowledge and beliefs around teacher support among SAs who have been involved in the programme over a long period of time? Exploring this question could help provide insight into how effective ongoing training has been in this context.



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## Annex 1: Project Design Details for EGRS I, EGRS II, and EGRP

### EGRS I (2015–2017)

The EGRS I intervention took place in 50 schools, which were divided geographically across three coaches. The coaching dosages are outlined in Table 3.

<b>Table 3. Coaching dosages for EGRS I</b>	
<b>Coaches</b>	<b>Schools</b>
Coach 1	17
Coach 2	18
Coach 3	14

### EGRS II (2017–2019)

The EGRS II intervention took place in 50 schools. The schools were allocated based on location and distance, hence the disparity in the number of schools allocated per coach. The coaching dosages are outlined in Table 4.

<b>Table 4. Coaching dosages for EGRS II</b>	
<b>Coaches</b>	<b>Schools</b>
Coach 1	10
Coach 2	14
Coach 3	10
Coach 4	16

### EGRP (2021–2023)

In the EGRP, which is the only ongoing intervention from the sample, the coach-to-school ratio was designed as 1:10 in year one in all intervention schools. In years two and three, this ratio was designed two ways: The first was a 1:7 ratio in the 40 schools receiving the base program. The second was a 1:20 ratio in the 40 schools designated to be part of the DH pilot program. In these pilot schools, DHs were trained to be coaches in their own schools. Teachers in these schools are meant to receive coaching by DHs with limited on-site coaching support from external coaches. Finally, 60 schools that make up the control group receive a base intervention that included learning and teaching support material and training, but which does not include coaching. The coaching dosages are outlined in Table 5.

<b>Table 5. Coaching dosages for EGRP</b>			
<b>Base program: lesson plans, learning and teaching support materials, and teacher training</b>			
<b>Intervention year</b>	<b>Intervention arm 1: Base program &amp; external coaching (on-site and virtual)</b>	<b>Intervention arm 2: Base program &amp; DH coaching</b>	<b>Control: Base program only</b>
	<b>40 schools</b>	<b>40 schools</b>	<b>60 schools</b>
2021	Coach-to-teacher ratio – 1:10	Coach-to-teacher ratio – 1:10	No coaching
2022	Coach-to-teacher ratio – 1:7	Coach-to-teacher ratio – 1:20	No coaching
2023	Coach-to-teacher ratio – 1:7	Coach-to-teacher ratio – 1:20	No coaching

The EGRP design aims for teachers in both intervention arms in year one, and in intervention arm 1 in years two and three, to receive monthly coaching visits by an external literacy coach. The coach gives advance notice to the school and the teachers prior to each visit in order to allow the teachers to prepare for the coaching session. This project design allows the coach to observe the best-case scenario, as it is assumed that teachers seek to give their best delivery of the planned lesson activities when under observation. During each school visit, the coach carries out pre-classroom observation discussions with each teacher based on the planned activities for the day, conducts classroom observations, and then engages in a post-observation discussion with each of the teachers observed.









EARLY  
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PROGRAMME

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