

A sociological analysis of phonics lesson plans across four structured pedagogic programmes in South Africa

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of the degree of Master of Education**

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ABSTRACT

Nationally, there has been widespread acceptance that South Africa's schooling system faces a literacy crisis. In response to this, school improvement efforts have taken the form of structured pedagogic programmes – “a triple cocktail” of interventions that offer teacher training, resource provisioning and lesson plans in an attempt to alter teacher's pedagogy and improve learning outcomes.

Focusing on lesson plans (also referred to as teacher guides) that attempt to structure phonics pedagogy, this study uses a Bernsteinian framework located in the sociology of education to analyse the various ‘controls’ the lesson plans place on pedagogy. It considers how these controls relate to the literature on effective phonics instruction as presented by the International Literacy Association. In addition, the study considers the various controls alongside an analysis of the level of scripting within each case, locating the discussion within current debates on the appropriate degree of scripting in lesson plans.

The study finds that there are differences between the lesson plans in terms of the controls offered particularly as these relate to notions of effective phonics instruction and levels of scripting. In conclusion, this research argues for expanded lesson plans that further exteriorise the phonics curriculum by offering more explicit evaluative criteria and increased scripting that further supports teachers in enacting effective, and contextualised, phonics programmes.

CHAPTER ONE

INTRODUCTION

1.1.Rationale and purpose of study

This study emerged out of my three interests in the field of education: in early grade reading instruction and intervention; in phonics teaching and in foundation phase teacher development in South Africa, in order to understand the problematic of perpetually low reading outcomes achieved by South African learners.

Lesson plans that direct phonics teaching, as seen in structured pedagogic programmes that have become a dominant approach to intervention in South Africa, is the space in which all three of my interests converge.

Very little research has incorporated systematic reviews of particular types of lesson plans across the Global South (Piper, Sitabkhan, Meija & Betts, 2018) and in South Africa, despite their increasingly wide use. Furthermore, and considering the potential of effective phonics instruction that has been established throughout the literature (Spaull & Pretorius, 2019), lesson plans that intend to structure phonics instruction have great potential in improving pedagogy and learner's low reading outcomes in South Africa.

Addressing this gap in the literature, this research aims to review and analyse lesson plans attempting to structure phonics pedagogy across structured pedagogic programmes in South Africa. To do so, four (initially five) structured pedagogic programmes' lesson plans that have been implemented in the last decade in provinces throughout South Africa, were selected in order to further the enquiry into lesson planning. The central research question is:

What 'controls' do the lesson plans attempt to place on the pedagogic instance across the four cases and how do these controls align to current research on effective phonics instruction, and lesson plan design?

A further five sub-questions ascertain the differences in structure and design across each case of lesson plans. They are:

- i) What regulations are held over the content of phonics in each case?

- ii) What controls are placed over pedagogy in each case?
- iii) How do these controls correspond to the literature on effective phonics instruction as proposed by the International Literacy Association?
- iv) What is the level of scripting of each lesson plan?
- v) And, what is the relationship between the level of scripting and the extent of pedagogic control in each case?

1.2 Locating the study

It is well established throughout the literature that an endemic feature of developing country contexts is the enduring and persistent low quality of instruction and low learning outcomes of students in schools across impoverished and resource-constrained contexts. More particularly, in the case of early grade reading, it is widely cited in South African literature, that as per the latest 2016 Progress in International Reading Literacy Study (PIRLS) reports, 78% of learners in South Africa – a typical developing country case (Hoadley, 2018) - after exiting the early grades, cannot read for meaning, or with comprehension, in their home language. In addition, Spaull and Pretorius (2019) found that Grade 1 oral reading fluency benchmarks, that are used to measure phonics skills of decoding, are only approximated by *some* learners completing Grade 3.

Spaull and Pretorius (2019) highlight the dangers of low reading outcomes and ‘low and slow’ decoding skills. Lack of fluency in skills of decoding limits learners’ ability to read with comprehension, and if “reading [for meaning] is the vehicle for learning in all other subjects, ... all other inequalities have at least some of their roots in reading inequalities” (p. 2). This is commonly noted as the reason for increased focus and research attention on learning in the early grades – that of ‘learning to read’, so that one may, later, ‘read to learn’ (Hoadley & Spaull, 2016). Improving reading outcomes, and the skills of decoding then, is foundational in improving schooling outcomes generally.

Reading inequalities as a primary cause of educational inequality explains the upsurge in interventions attempting to improve reading and learning outcomes (Krishnarathe, White & Carpenter, 2013; Lucas, McEwan, Ngware & Oketch, 2014; Glewwe & Muralidharan, 2015). However, coupled with, and perhaps the reason for low reading outcomes, it has been established (Hoadley & Spaull, 2017; Hoadley, 2018; Spaull & Pretorius, 2019; Taylor, 2019), is that of poor teacher expertise in teaching children to read, and that ultimately, teachers “as the primary interface

of teaching and learning” are a binding constraint that inhibit the improvement of reading outcomes in developing country contexts (Van der Berg, Spaull, Wills, Gustaffson and Kotze, 2016).

Classroom-based, qualitative research in South Africa describes a type of traditional, communalising pedagogy that perpetuates learner’s low educational outcomes (Hoadley, 2018; Hoadley, 2012; Muller & Hoadley, 2019). Teachers, ultimately at the forefront of pedagogy, mask their low levels of pedagogic expertise in communalising pedagogies (Muller & Hoadley, 2019). In response, there has been an urgency in attempting to improve or structure pedagogy through intervention approaches known as structured pedagogic programmes.

Lesson plans are one component of structured pedagogic programmes that exteriorise the curriculum into daily lessons and teaching routines (Shalem, 2017). The function of lesson plans has been a new area of enquiry as to whether they can be used to structure pedagogy and improve learning outcomes (Barbash, 2012), or increase teacher’s pedagogical knowledge and practical expertise (Davis & Krajcik, 2005). The quality of lesson plans in terms of level of scripting has been investigated (Piper et al, 2018), and criteria for designing lesson plans have been created also (World Bank Group, 2021).

In the meantime, there have been many iterations of structured pedagogic programmes, and more particularly lesson plans, across South Africa. Little is known about what is offered in these lesson plans or how they may differ, or what their potential may be in changing pedagogy and ultimately improving reading outcomes.

This research hopes to add to the discussion around the potential for phonics instruction, and the potential that lesson plans have in structuring pedagogy through early grade reading interventions.

1.3 Ethical Considerations

This research was a desktop review of lesson plan documents that were funded by government and philanthropic funds. As such, most of these were available in the public domain, or fairly easily accessible through consultations with members of the various philanthropic agencies responsible for the design and implementation of the lesson plan interventions.

As such, no ethics approval was required.

1.4 Overview and Thesis Outline

The study reviews the literature on the relevant contexts and theories surrounding and underpinning this research in Chapter Two, before developing a theoretical framework with which the four cases of lesson plans could be studied and analysed in Chapter Three. Chapter Three outlines Basil Bernstein's sociological theory of classification and framing to analyse the structure of lesson plans and compares these to the literature on effective phonics instruction and arguments for effective lesson plan design. The results and findings are presented and discussed in Chapter Four. In the final chapter, Chapter Five, the lesson plans' appropriacy for South African contexts is discussed and recommendations for effective lesson planning for phonics instruction are suggested.

CHAPTER TWO

LITERATURE REVIEW

2.1 Introduction

This study is located within the ‘explosion’ of structured pedagogic programmes within South African early grade reading intervention as discussed in Chapter One and the evident potential of lessons plans in improving learner’s reading outcomes.

This chapter aims to outline and provide a brief overview of the critical concepts in early grade phonics instruction as well as current trends in early grade reading intervention in the provision of lesson plans in structured pedagogic programmes. These will be located within debates on lesson plan design and utilise Bernstein’s concepts of classification and framing.

2.2 Context of Early Grade Reading (EGR) in South Africa

In describing what has been termed the *literacy crisis* in early grade reading outcomes, the low comprehension scores of South African learners are often cited, determined by our participation in the Progress in International Reading Literacy Study (PIRLS) in 2016 (Howie, van Staden, Tshele, Dowse & Zimmerman, 2016). It was seen that only one in four or five (or 22% of) learners could read for meaning at a basic level or could “locate and retrieve explicitly stated information, actions or ideas; make straightforward inferences about events and reasons for actions; or begin to interpret story events and central ideas” (Mullis, Martin, Kennedy, Trong & Sainsburg, 2009 as cited in Spaul & Pretorius, 2019). These figures show a crisis in reading *outcomes* and the general inability for early grade readers in South Africa to comprehend text. But reading for comprehension - a skill itself - has precedent skills or sub-components which act as binding constraints on the act of reading for meaning. Elsewhere this is referred to as the “comprehension iceberg”, “arguing that we need to move beyond a repetitive focus on weak comprehension outcomes and instead look below the surface at the causes of reading failure” (Spaul, Pretorius and Mohohlwane, 2018, as cited in Spaul & Pretorius, 2019, p. 157). A focus on the inputs and processes or sub-components of early grade reading yield deeper understanding as to *why* it is that young South African learners in the early grades cannot read (Spaul & Pretorius, 2019).

The end of one's 'learning to read' journey is comprehension. The PIRLS defines reading literacy as "the ability to use and understand those written language forms required by society and/or valued by the individual" (Mullis et al, 2009, p. 19). To meaningfully engage with and understand text is the aim of reading but meaning from text can only be gleaned after achieving fluency in decoding written language and having proficiency in oral language comprehension (Rastle, 2022; Spaul & Pretorius, 2019). In this research focus is on decoding skills.

'Decoding' is the ability to decipher the reading code. Languages with alphabetic scripts, like all of South Africa's 11 official languages, are those that use letters – a system of arbitrary symbols. These letters denote particular speech sounds and together they form the "reading code". Phonics instruction is, thus, the foundation of early grade reading instruction as it inducts children into the letter-sound correspondences that make up a language's reading code. After decades of intellectual debate, agreement has been achieved as to the crucial role of phonics instruction in early grade reading programmes (Snow, Burns & Griffin, 1998; Rastle, 2021; Spaul & Pretorius, 2019; Adams, 1990) in getting learners decoding with proficiency and fluency.

In an article by Spaul & Pretorius (2019), the outcomes of test data from control arms of intervention studies in South Africa are shared. These tests measured two components of decoding: knowledge of letter-sounds measured as 'letter-sounds read correctly (LCPM)', and rate of oral reading fluency measured as 'words correct per minute (WCPM)' (p. 159). It is well known that high levels of letter-sound knowledge leads to greater oral reading fluency. Quick recognition of letters and words relieves the load placed on working memory in the brain, and allows individuals to read with meaning (Rastle, 2022).

The data showed that in Grades 1 – 3, "learners' letter-sound knowledge and oral reading fluency scores are generally low and slow" (p.159). To illustrate how 'low and slow', Spaul & Pretorius state that "benchmarks for letters sounded correctly per minute are given at 40 letter-sounds correct per minute for Grade 1 ...[and that] some of our learners are only approximating this at the end of Grade 3" (p. 159). This indicates a serious problem at the level of decoding.

This research takes the position that areas of improving phonics instruction and development of effective phonics programmes are potentially powerful areas of intervention. Only in teachers teaching phonics effectively may children begin to decode efficiently and improve oral reading fluency so that they may begin to read for meaning.

2.3 Phonics: a promising feature of EGR classrooms

Phonics is prescribed by the Curriculum and Assessment Policy Statement (CAPS) to be taught explicitly and systematically in the foundation phase Home Language curriculum. Furthermore, the curriculum states that phonics is generally a whole class and teacher-directed activity (DBE, 2011).

The International Literacy Association (ILA) published a report describing the ‘power’ in effective phonics instruction – describing it as a crucial and basic skill in learning to read, showing the move away from debates regarding phonics versus whole language approaches to teaching reading, and general agreement in the idea that phonics instruction is an integral part in early grade reading instruction (ILA, 2019; Rastle, 2022; Spaul & Pretorius, 2019; Moss, 2010).

The ILA highlights the importance of explicit and systematic phonics instruction in the early years because in “teaching students the basic letter-sound combinations [the teacher] gives them access to 84% of the words in English print” (ILA, 2019, p. 2). Furthermore, considering that English has an opaque orthography, this percentage is much higher in languages with transparent orthographies or regular letter-sound correspondences, seen in South Africa’s Sotho and Nguni languages.

The case for phonics instruction is made in Spaul & Pretorius (2019) where they describe these decoding subskills that are taught through phonics (which derive from a finite knowledge base of letter to sound correspondences) as highly generative. “Knowledge of letter-sounds enables children to blend letters together into words, and the rapid recognition of word patterns enables fast oral reading fluency” (2019, p. 159) which frees up working memory to allow for comprehension. They argue that these finite skills can be developed to mastery within a year in transparent orthographies. What is more, “these skills are more immune to the effects of socioeconomic factors than more complex aspects such as language proficiency, vocabulary development and reading comprehension” (Spaul & Pretorius, 2019, p. 159).

A review by Hoadley and Boyd (forthcoming) shows the dominance of phonics teaching in early literacy classrooms in South Africa. Among many large-scale, school improvement studies teachers were seen to show fidelity to phonics programmes above other language components prescribed by curriculum interventions (Hoadley & Boyd, forthcoming). Phonics instruction as a whole-class and teacher-directed activity was a dominant feature of the classrooms in converging

observation studies where these classrooms are generally lower quintile and serving students from low socio-economic contexts. Phonics instruction is, thus, a promising feature which holds great potential in South African early grade reading classrooms in improving decoding and reading outcomes (Rastle, 2022; Spaull & Pretorius, 2019; Hoadley & Boyd, forthcoming).

What should phonics in an early grade reading classroom look like, however? The ILA's report describes indicators of effective phonics instruction. First, and as the South African curriculum affirms, phonics is to be taught explicitly and systematically. Teaching, hence, is to be direct and intentional.

The ILA (2019) describes another seven key characteristics of effective phonics instruction. Other than phonics instruction being teacher-directed (explicit) and following an intentional sequence (systematic), instruction is to comprise of regular repetition and review cycles that ensure learners achieve frequent practice and mastery of decoding skills in a programme that is fast-paced and comprises activities of dictation, blending, word building and word awareness activities and regular practice of high frequency words.

A further characteristic of an effective phonics programme is found in the “reading of connected texts” so that the instruction of phonics is not isolated but contextualised within meaningful interactions with ‘decodable texts’. “The tight connection between what students learn in phonics and what they read is essential for building a faster foundation in early reading” (ILA, 2019, p. 5). This characteristic is reliant on appropriate instructional materials that are aligned to a particular sequence of phonics instruction. The case for a ‘connected’ phonics programme is found in Moss (2010) who warns against the dangers of a “decontextualised phonics programme”. A contextualised phonics programme enshrines both aims that have plagued intellectual debates between the two traditions to teaching reading. Contextualised phonics programmes bring together ‘atomised’ and technical traditions that advocate phonics instruction, and ‘meaning-first’ traditions that support whole language approaches to reading, by teaching technical skills within connected, meaningful and decodable texts that support reading for meaning.

2.4 The context for lesson plans: structured pedagogic programmes

Reform initiatives and early grade reading interventions have been widespread, and much research has been done in analysing the effectiveness of these (Krishnarathe et al, 2013; Lucas et al, 2014;

Kerwin & Thornton, 2015; Glewwe & Muralidharan, 2015; Kim, Boyle, Zuilkowski & Nakamura, 2016). Glewwe and Muralidharan in 2015 published a report titled *Improving School Education Outcomes in Developing Countries: Evidence, Knowledge Gaps and Policy Implications*, in which they investigated, and ultimately drew up a framework that synthesized lessons learned from evidence across a large-scale review of developing country studies. In attempting to answer the question ‘what education policies increase student learning’, they reviewed studies that analysed the extent to which pedagogic materials and facilities improved student learning. What they concluded was that these produced marginal or statistically insignificant improvements on student outcomes.

“There is growing recognition of the limits of conventional input/output models of change. Learner outputs are not produced by isolated inputs in the classroom or school, but rather how these inputs are used by instructional practice” (Raudenbush, 2005 as cited in Ramadiro & Porteus, 2017, p. 36). In other words, there is growing consensus throughout school improvement literature that “teachers are at the centre of reform, for they must carry out the demands of high standards in the classroom. Thus, the success of ambitious education reform initiatives hinges, in large part, on the qualifications and effectiveness of teachers” (Glewwe & Muralidharan, 2015, p. 56). Teachers, after all, enact pedagogy.

Placing teachers at the centre of intervention and educational reform initiatives, it becomes necessary, as Hoadley (2018) does, in exploring the dominant pedagogic forms seen across these contexts of school improvement. Hoadley (2018), although cautious to suggest homogeneity within and between developing country contexts, draws attention to commonalities or features of pedagogy and pedagogic forms that developing country contexts share. These features are described below, and provide valuable input into understanding what various interventions may be attempting to shift.

Pedagogy in developing countries can be described as teacher dominated, communalised and undifferentiating. In essence, there is a strong authoritarian position held by teachers who dominate and drive instruction to a largely homogenous, passive and undifferentiated group. What follows, then, in pedagogy is a dominance of chalk and talk, memorization and drill activities, collective chanting, copywriting and rote learning. The whole class production of knowledge is the foundation of a communalising, and undifferentiated, pedagogy (Hoadley, 2018; Hoadley &

Muller, 2021). Typical South African pedagogies have been found to share these features with “traditional” pedagogies.

In curriculum terms and in South Africa, this type of pedagogy has an undeniable slow pace and ultimately leads to limited curriculum coverage (Hoadley, 2012; Hoadley, 2018). In terms of reading instruction, oral discourse and “limited engagement with text for reading and writing, especially engagement with extended texts”, dominates (Hoadley, 2018, p. 13). These features of pedagogy are obdurate to change and have been found to severely limit the uptake of programme interventions. In theorizing why communalising pedagogies have shown resistance to change in interventions gone by, it is suggested that communalising pedagogy mask low levels of teacher competence and teacher expertise (Hoadley, 2018) and are embedded in “a larger set of community solidarity coping mechanisms rendered necessary by environments of endemic poverty” (Muller & Hoadley, 2019). In other words, effective interventions it would seem have to combine input processes with aspects of teacher development, i.e. pedagogical structuring, to improve learning outcomes in these contexts.

As a result, teacher professional development is a major focus of systemic reform initiatives (Garet et al, 2001). This shift is seen in the uptake of structured pedagogic interventions (Snilstveit, Stevenson, Menon, Phillips, Gallagher, Geleen, Jobse, Schmidt, & Jimenez, 2016; Kim & Davidson, 2019; Taylor, Cilliers, Prinsloo, Fleisch & Reddy, 2017).

A dominant approach in Africa and other developing contexts in an attempt to address the literacy challenge, is to structure or change pedagogy, through an approach to intervention design called structured pedagogic programmes. These programmes are a package of interventions “that address different constraints in schools, such as low levels of training among teachers, lack of materials and lack of structured content” (Snilstveit et al, 2016, p. 26).

Components generally include some form of teacher training (or coaching), customized curricular and pedagogic materials and lesson plans (often scripted). The early grade reading programmes under study have features of each and are all instantiations of structured pedagogic programmes in South Africa.

Glewwe and Muralidharan (2015) reviewed studies around the effectiveness and impact of customized curricula and pedagogic materials. There have been studies in South Africa that have

deliberated on modalities of teacher training (Cilliers, Fleisch, Prinsloo & Taylor, 2020; Cilliers, Fleisch, Kotze, Mohohlwane, Taylor & Thulare, 2020), investigating the cost-effectiveness and impact of various types: centralised training versus personalized coaching as well as in-person coaching versus virtual or digital coaching.

There are few studies, however, that investigate the design and structure of lesson plans (which are regarded as effective and cost-effective tools in structuring pedagogy). It is a relatively new area of enquiry. This is echoed by Hoadley (forthcoming) who states that little is known about “what kind of programme is simple enough for teachers to implement on a daily basis, yet powerful enough to make a difference in the development of literacy skills and ultimately reading with understanding”. Although research has shown the benefits of teacher’s use of (scripted) lesson plans (Fleisch & Schoer, 2014; NEEDU, 2014 as cited in Shalem, Steinberg, Koornhof & De Clerq, 2014), very little is known about what kinds of lesson plans are ideal for supporting teachers (Piper et al, 2016).

2.5 A theoretical consideration of lesson plans: an extension of curriculum

Lesson plans organize the knowledge and skills prescribed by national curricula (the ‘what’) into core teaching routines (the ‘how’) across school time (days of the week and weeks of the term across the school year). Essentially, lesson plans attempt to control enactment of the curriculum through the exteriorization of curriculum topics into daily lesson plans that are ordered by various selection, sequencing and pacing principles. They function primarily to further specify curriculum (Shalem, 2017).

Shalem, Steinberg, Koornhof and De Clerq (2014) analysed an instantiation of a structured pedagogic intervention in South Africa, called the Gauteng Primary Literacy and Mathematics Strategy (GPLMS). They explain how lesson plans “translate the weekly content and skills set out in [the curriculum] into core teaching routines ... and specify pacing of the learning activities with strict daily timeframes, standardized for the whole school year... and provide content, questions, activities and forms of assessment” (p. 14). They agree that scripted lesson plans ‘fill the gap’ of the current South African curriculum (CAPS) in that the lesson plans prescribe the ‘how to’ of enacting the content and assessment that is stipulated by CAPS.

This particular study by Shalem et al (2014) is important to this research, in that they viewed an instantiation of lesson plans in South Africa, called the Gauteng Primary Literacy and Mathematics Strategy (GPLMS), through the distinction in the lesson plan's "purpose-emphasis". Shalem et al (2014) concluded that the GPLMS listed a 'protocol of action' in prescribing the sequence and pacing of the lesson and an explanation of the topics that were included. However, a rationale behind their inclusion and an indication to help teachers establish whether they had achieved the outcome of the lesson, or that learners had understood, were absent. It was assumed that teachers held this knowledge.

Pertinent to this research, it became evident that lesson plans by design can regulate different dimensions of pedagogy. The scripted lesson plans in the GPLMS, they argued, "provide knowledge of sequence and pacing of content but they cannot help teachers know the topic (i.e. evaluative criteria)... unless the lesson plans are expanded" (Shalem et al, 2014, p. 31). The GPLMS, they argue, were fit for purpose in directing instruction, but not in educating, or developing the expertise and knowledge of teachers (Shalem et al, 2014).

The literature makes a distinction between two approaches to the scripting of pedagogy: that of direct instruction first developed by Engelmann (as seen in Barbash, 2012), and educative curriculum materials (ECM) as described by Davis & Krajcik (2005).

Direct instruction prescribes the pedagogic sequence only. It is underpinned by three main principles: that the learning process is the same for all learners, that concepts have 'rules' which must be taught to learners of diverse abilities and starting points and, finally, that teachers may be fallible in their relay of these 'rules'. Direct instruction ensures that children receive explicit and unambiguous instruction in the concepts they need to learn by providing a step-by-step and highly detailed description of pedagogy. In contexts where high levels of pedagogical expertise cannot be guaranteed, direct instruction will ensure that children learn, according to Engelmann's theory (Barbash, 2012; Shalem et al, 2014).

Educative curriculum materials, on the other hand, describe what teachers need to do while developing teachers' specialised knowledge base. Ultimately, ECM are intended to promote both teacher and student learning (Davis & Krajcik, 2005; Shalem et al, 2014). "The conception of ECM intends to engage teachers in the ideas underlying the writer's decisions and suggestions ... rather than merely guiding what teachers need to do, ECM aims to speak to teachers about the

ideas underlying the tasks” (Remillard, 2005; Shalem et al, 2014, p. 19). ECM aim to change pedagogy by increasing the specialist knowledge base that is engaged during pedagogical decision making.

Although the aim of this research is not to deliberate on which side of the distinction various intervention programmes fall, the distinction illuminated by Shalem et al (2014) exposes the various functions lesson plans serve in ‘structuring’ pedagogy and the assumptions that are perceived to drive these shifts in pedagogy.

Shalem (2017), independently and in another study, investigated the presentation of knowledge criteria in GPLMS lesson plans – indicators of ‘educative-ness’ in ECM types of lesson plans. Shalem considered “if and how materials can transmit knowledge criteria to teachers [in order to] provide potentially more enduring changes in the level of cognitive resource”. Ultimately, Shalem argues that, “even if curriculum coverage has been exteriorised by selection, sequencing and pacing of topics into daily [scripted lesson plans] and although core teaching and assessment routines are specified, unless the teacher has strong conceptual knowledge... she will struggle to decide what evaluative criteria should count... and how to make it explicit for the acquirer” (pp. 3-4). Developing strong conceptual knowledge would entail an extension of GPLMS lesson plans to include knowledge criteria which was absent in the GPLMS.

Shalem’s (2017) investigations of lesson plans invoked a Bernsteinian language of description – adopted in this research.

2.6 A Bernsteinian orientation to curriculum and pedagogy

This enquiry is grounded in the work of Basil Bernstein, who declared education and more particularly its three message systems – its organization, transmission and evaluation – a major area of sociological interest. Concerned with cultural reproduction, especially across evidently unequal and socio-economic lines, Bernstein recognized education as a chief regulator of the ‘structure of experience’ or consciousness. He argued that how educational knowledge is selected and organized, realized through curricula, and how it is then transmitted and reproduced through the message systems of pedagogy and evaluation reflect codified notions of the distribution of power and principles of social control both for individual and collective identities (Bernstein, 1975).

Young (2011) in 'what are schools for' in Education, Sociology and Culture in reflecting on educational knowledge that is particular to the school and schooling states that "Bernstein's primary interest was in developing a language for thinking about different curriculum possibilities and their implications". Bernstein developed the conceptual tools of classification and framing in his observations of two curriculum types and the social relation fostered between these (Bernstein, 1975).

Bernstein noticed within curriculum that various topics, or contents, had different relative status and relationships to one another. Some topics were afforded more time, some topics were compulsory while others were optional, but more importantly, topics were organized into either closed or open relation to others. Some contents were strongly isolated and bounded from others while some curricula engendered open and blurred boundaries between its contents. The curriculum types – the relationship between its contents - affected the forms of the content's transmission through various patterns of social relationships it fostered between transmitter and acquirer, and between transmitter and topic/s, and acquirer and topic/s.

In this sense, Bernstein revealed the notion of boundary strength, the boundaries between contents, and the boundaries between agents, and between what could enter the pedagogical relationship. The tools of classification and framing were developed to better describe and consider these boundaries.

Classification is a concept employed to describe the relationship between contents in curriculum. Where classification is strong, contents are bounded and in closed relation to one another, and are likely seen in curriculum of the collection-type. In contrast, where classification is weak, contents are integrated and the boundaries separating them are weaker as in integration-type curriculum. Classification, Bernstein says (1975, p. 88) "focuses our attention upon boundary strength as the critical distinguishing feature of the division of labour of educational knowledge". As such, it is possible to see how phonics is structured and how it relates to other subjects and dimensions of reading in each case of lesson plans.

"Framing refers to the degree of control teacher and pupil possess over the selection, sequencing, pacing and evaluation of the knowledge transmitted and received in the pedagogical relationship" (Bernstein, 1975, p. 88 as cited in Hoadley, 2007, p. 683). Framing draws our attention to the relations within *boundaries*. Where framing is strong, the control over the rules of communication

of transmission are controlled by the teacher. Weaker framing entails increased control by learners over the selection, sequencing, pacing, and evaluation of the knowledge transmitted (Bernstein, 1975; Hoadley, 2007). Framing shows how pedagogy is structured.

Lesson plans are curricula tools that prescribe, or structure, pedagogy. Lesson plans, in the words of Shalem (2016), are an exteriorisation of curriculum which specify the selection, sequence, pacing and evaluation of the educational knowledge to be transmitted in pedagogy. As such, the conceptual tools of classification and framing can be used to analyse the structure of lesson plans.

2.7 Other analyses of lesson plans – levels of scripting

In a report compiled in 2018 by Piper, Sitabkhan, Meija & Betts titled *Effectiveness of Teacher Guides in the Global South: Scripting, Learning Outcomes and Classroom Utilizations*, the design and utilization of teacher guides in 19 projects across 13 countries were investigated.

Their study had four components. First, the physical characteristics of each teacher guide were considered in terms of length, layout and level of scripting. Second, teacher guides were organised and scored across a scripting index and correlated to programme impacts (scores in oral reading fluency (or correct words read per minute) “to determine whether more scripting led to greater impacts on learning outcomes”). The third and fourth components included observations of and interviews with teachers to ascertain their use of the teacher guides in classroom practice.

Their findings are considered in turn below, and their implications for this research outlined. First, programmes with teacher guides were found to improve oral reading fluency by 6.1 correct words per minute, on average, showing that teacher guides show substantial and meaningful impacts on learning.

Secondly, it was found that across the 19 projects, there was great variation in the length of lessons and the density of words counts. Programmes designed at a later date appeared to reduce the length of their lessons “to increase utilization and ease of use” (Piper et al, 2018, p. 1). It was due to the variation among teacher guides that Piper et al developed a scripting index.

The scripting index revealed “a moderate, negative relationship between the level of scripting and improved learning outcomes”. In other words, where levels of scripting increased by 10 percentage

points on the scripting index, programme impact was seen to decrease by 1.4 correct words per minute. As such, Piper et al (2018, p. 2) put forward that ...

These results were not always statistically significant depending on the model and control variables. In other words, although our analysis revealed that programs [sic] with scripted teacher's guides improved learning outcomes, having too much scripting could detract from overall program effectiveness. Instead, we found that teacher's guides that provided fully scripted lessons at the beginning of the teacher's guide and shifted to structured lesson plans instead of scripted lessons tended to improve learning outcomes... By this definition, teacher's guides that taper off in their level of scripting would be considered structured, and not fully scripted.

Piper et al argue that structured teaching guides show the most improvement in learning outcomes, but overly scripted lesson plans were less effective. Two points are to be made here that are important to consider in this research. First, there is a distinction between types of lesson plans by their extent of scripting. The difference lies in the guidance offered to teachers where structured guides refer to scaffolded guidance in prescribing what content to teach and a clear and consistent instructional model, whereas scripting referred to the worded detail in the lesson plans, where teachers are told what to say.

This distinction is better stated elsewhere, in the World Bank Group's (2021, p. 6) *Teacher Guide Diagnostic Tool* which states that "teacher guides refer to a set of lesson plans for teachers that can range from full-scripted (i.e. the teacher is meant to read directly from the guide to students) and highly structured (i.e. the guide includes general guidance of activities within a lesson but does not script out instruction word-for-word)". The distinction as described here is adopted in descriptions of lesson plans in this research.

Secondly, the conclusion drawn that fully scripted lesson plans showed a decrease in programme impacts and are thus less effective is to be considered cautiously. Piper et al's type of analysis, although useful, is limited and its limitation acknowledged by the authors of the report in their regression analysis showing that 88% of the impact of learning is explained by factors *beyond* the level of scripting in the teachers' guides... and is better explained by the actual *quality* of the teacher's guides themselves" (p. 12). Quality is not something that they look at in their study.

Furthermore, the argument against increasingly scripted lesson plans is contended by research showing the effectiveness of direct instructional curricula that fully script instruction. Direct

instructional (DI) curricula “invented nearly 50 years ago, is a scripted step-by-step approach to teaching that is among the most thoroughly tested and proven in the history of education” (Barbash, 2012, p. 2).

The findings of a meta-analysis based on 328 studies involving 413 study designs and almost 4000 effects, between 1966 to 2016, reinforced the statistically significant positive results that DI curricula had achieved after implementation (Stockard, Wood, Coughlin and Rasplika Khoury, 2018). “The effects reported in this analysis, and calculated from 50 years of data on DI, indicate that exposure to DI could substantially reduce current achievement disparities between sociodemographic groups” (Stockard et al, 2018, p. 25). In other words, DI, through carefully selected, sequenced and scripted curricula, have achieved consistently promising gains in learning outcomes. Acknowledging gains in using DI curriculum have largely been ignored due to current popularity with theories of constructivism, misconceptions of the DI theory underpinning materials, and expectations placed on teachers.

Stockard et al (2018, p, 24) state that “another reason that DI may not be widely used involves a belief that teachers will not like it or that it stifles teachers’ ability to bring their own personalities to their teaching. Yet, ..., proper implementation of DI does not disguise or erase a teacher’s unique style. In fact, the carefully tested presentations in the programmes free teachers from worries about the wording of their examples or the order in which they present ideas and allow them to focus more fully on their student’s responses and ensure their understanding”. In other words, it may relieve teachers from curriculum planning and allow them to refine their own pedagogy.

The debate on scripting has been a contentious one, as much else in the early reading space. Careful not to polarise discussions on scripting, this research considers arguments on both sides when considering the different degrees of scripting seen in different programmes.

CHAPTER THREE

THEORETICAL FRAMEWORK AND RESEARCH METHODOLOGY

This chapter offers a description and explanation of the analytic frame that was developed for this research project. It draws, firstly, on the work of the educational sociologist Basil Bernstein and his conceptual tools of classification and framing (Bernstein, 1975) to answer two of the research's sub-questions, namely:

- i) What controls are held over the content of phonics in each case? And,
- ii) What controls are placed over pedagogy in each case?

These initial questions are grounded in a discussion on phonics by drawing on the report by the International Literacy Association (2019) which details the characteristics and features of effective phonics instruction in the early grades, in order to answer the question:

- iii) How do these controls facilitate an effective phonics programme?

Furthermore, and in keeping with current research on the nature of scripting in lesson plans and on the amount of detail required for lesson plans to be considered 'effective' (Piper et al, 2018), the last two questions will be investigated:

- iv) What is the level of scripting in each case of lesson plans? And,
- v) What is the relationship between the level of scripting and the extent of controls in each case?

In sum, this chapter aims to introduce the theory and key texts, firstly, by describing the use of Bernstein's (1975) concepts of classification and framing as well as the rationale behind their utility in exposing the various controls that the lesson plans place on an instance of phonics pedagogy in the attempt to 'structure' it. Then a description will be presented of how the analysis will be grounded in the ILA's (2019) report on 'Meeting the Challenges of Early Literacy Instruction' in thinking about how the various controls may or may not facilitate an effective phonics programme. Lastly, drawing upon Piper et al's (2018) report on the 'Effectiveness of Teacher Guides in the Global South', I outline how this research attempts to investigate the level

of scripting as well as the relationship between scripting and the extent of controls in each case of lesson plans.

After a description of the theory and key texts, the research methodology will be explained.

3.1 Theoretical Framework

3.1.1 Bernstein's tools of classification and [external] framing

Young (2011, p. 153) in 'what are schools for' in Education, Sociology and Culture in reflecting on educational knowledge that is particular to the school and schooling explains that "Bernstein's primary interest was in developing a language for thinking about different curriculum possibilities and their implications".

Bernstein's (1975) work 'On the Classification and Framing of Educational Knowledge' observed various curriculum types. He described curriculum as a constellation of social facts by which "units of time and their contents are brought into a special relationship with each other" (p. 86). He observed that some contents of educational knowledge were brought into either an open or a closed relation to each other. In other words, boundaries between some contents were strong and clear-cut, and other boundaries between contents were blurred and showed reduced insulation.

Noting the differences in the open or closed relationship between contents, Bernstein distinguished between two types of curricula – the collection-type, where contents are clearly bounded and insulated from each other, and an integrated-type curriculum where contents stand in an open relation to each other. These were differentiated by the strength of the boundaries between contents. The notion of boundary strength informed Bernstein's concepts of classification and framing which he used to analyse the three message systems of educational knowledge: curriculum, pedagogy and evaluation (Bernstein, 1975). The *structure* of curriculum and pedagogy are of concern here.

Classification is the concept employed to describe the relationship between contents in curriculum. Where classification is strong, contents are bounded and in closed relation to one another, and are likely seen in curriculum of the collection-type. In contrast, where classification is weak, contents are integrated and the boundaries separating them are weaker as in integration-type curriculum. Classification, Bernstein says (1975, p. 88) "focuses our attention upon boundary strength as the

critical distinguishing feature of the division of labour of educational knowledge” or discourses. As such, it is possible to see how phonics is conceptualised and considered in each case of lesson plans. Classification is also about the relation, or boundaries, between contexts, between agents and between spaces. I have employed classification to consider the boundaries between agents or pedagogic subjects (learners) in terms of individualising and communalising pedagogies. In my working of the theory, communalising pedagogies blur the boundaries between learners and view their understandings, responses and productions as homogenous, and communal; and individualising pedagogies where learner’s understandings, responses and productions are strongly bounded, differentiated, and their various ability levels considered.

Where classification expresses notions of power where some contents are given higher relative status over others, framing is associated with the notion of control. “Framing refers to the degree of control teacher and pupil possess over the selection, sequencing, pacing and evaluation of the knowledge transmitted and received in the pedagogical relationship” (Bernstein, 1975, p. 88 as cited in Hoadley, 2007, p. 683). Framing draws our attention to the relations within *boundaries*. Where framing is strong, the control over the rules of communication of transmission are controlled by the teacher. Weaker framing entails increased control by learners over the selection, sequencing, pacing, and evaluation of the knowledge transmitted (Bernstein, 1975; Hoadley, 2007). Framing shows how pedagogy is structured.

Lesson plans translate curriculum expectations into daily routines of pedagogy. As such, lesson plans are an exteriorisation of curriculum (Shalem, 2016) which specify the selection, sequence, pacing and evaluation of the educational knowledge to be transmitted. As such, control by the teacher in the rules of communication in pedagogy are limited, but framing, as described above, is not weak for it does not entail an increased range of options to learners. Rather the concept of *external* framing is used to refer to the control by the lesson plans over teacher’s practice, where strong external framing shows control by the lesson plans, and weak external framing refers to the control by the teacher over selection, sequence, pacing and evaluation of knowledge. The term ‘framing’ and ‘external framing’ are used synonymously from here on for purposes of simplicity.

3.1.2. Characteristics of effective phonics instruction

The report published by the International Literacy Association (ILA) in 2019 which outlines key characteristics of effective phonics instruction (more fully described in the literature review in

Chapter Two) is employed here to contextualise the various readings of classification and framing and ground these very abstract concepts within recent discussions on effective phonics instruction. Whereas Bernstein's theory focuses on the *structure* of curriculum (or lesson plan, in this case) the ILA schema is used to consider the *content* of the phonics programmes to some extent, through the report's recommendations on best *English* phonics instruction.

Besides general acknowledgement that phonics instruction is to be explicit and systematic – direct and intentional – another seven key characteristics of effective phonics instruction were identified by the author and 18 panel members of the ILA. These nine (in total) indicators of effective phonics instruction were outlined in the report and descriptions of each 'characteristic' of effective phonics instruction are briefly discussed below.

Phonics instruction is to be explicit and direct. The "initial introduction of a letter-sound relationship, or phonics skill, is directly stated to students" (ILA, 2019, p, 3). These are contrasted against discovery methods where phonics skills are believed to be acquired naturally and without explicit instruction.

Phonics instruction is to be systematic and follow an intentional sequence of letter-sounds and words, encouraging progression through the mastery of simple to more complex sounds and words. The International Literacy Association states that "systematic instruction includes a review and repetition cycle to achieve mastery and goes from the known to the new in a way that makes the new learning more obvious and easier for students to grasp" (ILA, 2019, p. 3).

Furthermore, review and repetition cycles and sequence of progression need to follow a high-utility, fast-pace scope and sequence that allows learners to learn high-utility skills quickly and get them reading and writing words as early as possible. As such, a fast pace of transmission sets the foundations for an effective phonics programme.

A characteristic of an effective phonics programme is found in the reading of connected texts so that the instruction of phonics is not decontextualised but contextualised within meaningful interactions with 'decodable texts'. "The tight connection between what students learn in phonics and what they read is essential for building a faster foundation in early reading" (ILA, 2019, p. 5). This characteristic, however, is reliant on appropriate instructional materials that are aligned to a particular sequence of phonics instruction.

An effective activity in review and repetition cycles are activities of dictation. The ILA defines this activity as “guided spelling with teacher think-alouds” (2019, p. 4). Dictation offers increased opportunity for learners to “try out” their developing skills to express ideas in written form. Other activities that feature in effective phonics programmes are activities that build word awareness, activities of blending and activities that incorporate high-frequency words, frequently. “Teaching students how to sound out words [stringing together letter-sounds] must be frequently modeled and applied” (ILA, 2019, p. 4), in other words, blending. The continual practice of irregular and high-frequency or common words mark an effective phonics programme as do activities that build word awareness. These include activities of word building and word sorting which allow students “to work with letter-sounds flexibly and fully analyse words for their component sounds and spellings” (ILA, 2019, p. 5).

As indicators of effective phonics programmes and methods of effective phonics instruction, ‘blending’, word awareness activities, dictation and practice of high frequency words tell of the ‘content’ of phonics programmes, which cannot be captured by Bernstein’s classification and framing. As indicators, they are determined to be absent or present in each of the programmes. The activity of dictation – guided spelling activities with teacher think alouds - is interesting however as although it forms the content of a phonics programme, it is a methodology. The extent to which the spelling activities are guided and supported by teacher talk, speaks to various notions of control and as such can be captured by Bernstein’s language of description.

The indicators and their use in this study’s theoretical framework is elaborated later in this chapter. Attention now is turned to the idea of scripting.

3.1.3. Scripting

Consider the following extract:

Very little is known across the Global South, about the level of scripting that exists in instructional materials used. Even less is known about how the level of scripting affects teacher usage of the materials and instructional decision making in the classroom, how the level of scripting affects teaching quality, and ultimately learning outcomes. This information is scarce because very little research incorporates a systematic review of particular types of scripted lesson plans, nor does a structured process exist that helps guide new literacy... programmes in determining what kinds of teacher’s guides are ideal for supporting teachers (Piper et al, 2018, p. 5).

Piper et al (2018), in identifying the gaps in research and literature on the nature of scripting in lesson plans across the Global South, encouraged this research to incorporate an analysis of scripting. More so, it encouraged an analysis of the level of scripting with regard to the level of control the lesson plans hold over phonics pedagogy.

Piper et al developed a scripting index to determine the level of scripting across 34 teacher guides across 19 projects in 13 countries in the Global South due to the wide variation seen in the programme designs. The scripting index which ranked the teacher guides first, by the number of pages per lesson and second, by the number of words per page, was generated to create an index score or rank out of 100 per programme.

In order to create the scripting index Piper et al first ranked the projects by the number of pages per single lesson and assigned the project with the highest page count per lesson with the highest score of 50. Other projects were then assigned a proportion of 50 points corresponding to the number of pages per lesson relative to the 50-point project. Next, the projects were ranked in much the same way but by the number of words per page. The project with the highest word-count-per-page was given the maximum 50 points, and the remaining projects were assigned a proportion of 50 points corresponding to the number of words per page. To allocate a total index score out of 100, the two totals were added together per project to give the project's position along the scripting index.

However, scripting was more simply defined as “the amount of words given to the teacher to explain what he or she should say” (2018, p. 11). This was the definition of scripting adopted in this research. Rather than generating a scripting index, word counts in activity descriptions in single lessons were totaled, analysed and compared. I provide more detail on this below.

3.2 Research methodology

This section outlines the research methodology that culminates in the analysis that follows in Chapter Four. Firstly, the multiple case study approach that informs this research will be considered, before each case in the sample data set is described. The processes of data collection, sampling strategies, extraction of data and the generation of an “external language of description” (Bernstein, 2000 as cited in Hoadley, 2007) will be outlined in turn.

3.2.1 Research design: A multiple case-study approach

Bernstein argues that instances of transmission of educational knowledge whether in curriculum, pedagogy or evaluation are social facts, that kinds of knowledge and pedagogic strategies that are given higher status relative to others are social choices and not intrinsic to the value of the knowledge or pedagogic strategies themselves (Bernstein, 1975). Similarly, instantiations of lesson plans or teacher guides generated by organizations as part of structured pedagogic programmes, too, represent a “constellation” of choices (Bernstein, 1975, p. 87). They become, themselves, social artefacts. Social research aims to study these social phenomena using different approaches and strategies. One of these, and the one informing this research, is the case study approach.

The purpose of employing social research can be two-fold: to build an understanding of social facts *extensively*, as in a large-scale survey studying a large number of cases or to build an in-depth and *intensive* understanding of one or a handful of cases or social phenomena (Swanborn, 2010). This research aims to develop an intensive understanding of a specific number of instances, called cases, of lesson plans in structured pedagogic programmes in South Africa’s early grade reading space. Intensive research of single or multiple instances are referred to as a case, or multiple-case, study.

An intensive case study provides us with tentative ideas about a few instances of a social phenomenon and can answer broad questions about this phenomenon by developing a thorough understanding of it (Swanborn, 2010, p. 3). Whether these understandings generated by the in-depth study of a small number of cases can be generalized to other instances across other contexts is the task of extensive approaches to social research. Similarly, generalisations drawn further than the cases studied here is not the aim of this research. Rather, the aim is to garner a deep understanding of a selection of South African lesson plans or teacher guides as well as a model for their analysis. Gerring (2007, cited in Swanborn, 2010, p. 8) argues that “a case study is an intensive study of a single case (or a small set of cases) with an aim to generalise across a larger set of cases of the same general type”. Generalisations are drawn in intensive research when one considers commonalities, and indeed, differences across instances. In this way, as is the case here, a language of commonality and difference – a framework - can be generated and applied to a range of similar, but different, instantiations of the same social phenomena.

Said differently, this research's design employs a multiple case study approach, to analyse lesson plans or teacher guides across different structured pedagogic programmes, using a sociological, Bernsteinian framework, to garner an in-depth understanding of the various controls lesson plans or teacher guides place on the pedagogic instance, and how these plans or guides can be imagined functioning theoretically in typical South African contexts. Four instances of lesson plans were considered and studied. They are outlined below.

3.2.2 The sample of cases

Programme to Improve Learning Outcomes (PILO)

Under the campaign of the Kwa-Zulu Natal Department of Education called 'Jika iMfundo', the Programme to Improve Learning Outcomes (PILO) – a not-for-profit organization – designed and implemented a structured pedagogic programme as intervention. This PILO programme was implemented over three years (2015-2017) in two districts of Kwa-Zulu Natal. The provincial department's Jika iMfundo's aim was on improving curriculum coverage. PILO designed a three-armed intervention to ensure increased coverage of the isiZulu Grade 1 curriculum which included a toolkit - lesson plans and learning and teaching support materials (LTSM) as graded readers and posters; curriculum planners, trackers and assessment resources and lastly, just-in-time training for Heads of Departments (HoDs) at the various schools.

In describing the lesson plans, Metcalfe (2018, p. 53) states that, "the lesson plan gives an indication of time required (as stipulated by CAPS), the content/concepts/skills taught, the resources required and an outline of the focus of the lesson with suggestions for sequence. This is a resource for the teacher when planning for the lesson – in terms of organising resources and preparing the content and planning assessment and homework activities. It also assists the teacher to meet the requirements in CAPS for the amount of time and lessons to be offered each week in various components in each grade and term".

These lesson plans are under analysis here and are referred to as the PILO lesson plans.

National Education Collaboration Trust (NECT)

The **National Education Collaboration Trust (NECT)** in the years of 2013 and 2014 operationalised the 'Professionalisation of Teaching' programme. This included a number of

interventions but one of concern here is the *Learning Programmes* intervention which aimed to provide teachers with curriculum support to teachers across English, English as a First Additional Language (EFAL), isiZulu, Maths and Science. In 2013/2014, the Learning Programmes intervention offered teachers with pacesetters and trackers as well as lesson plans to support teacher's coverage of the curriculum as well as training programmes and in-school support (NECT, 2014, p. 8). According to NECT's 2016 annual report, of the 2.6 million items of teaching materials and school management instruments distributed to teachers across South Africa, the largest proportion of these were materials from the Learning Programmes toolkits which had, by 2016, been designed to cover teaching in isiXhosa, Setswana, Sepedi, Tshivenda and Xitsonga alongside isiZulu and English. The "daily lesson plans standardize the pitch, pacing and sequencing of the curriculum across the country" (NECT, 2016, p. 23), and are accessible online under an open-source approach.

As such, and although not considered a structured pedagogic programme by definition of Snilstveit et al (2016), the aim of resourcing classrooms with materials like daily lesson plans, that "focuses on changing behaviours of the over 400 000 teachers making up the system" (NECT, 2016, p. 25), implies an intention to 'structure' pedagogy. The Learning Programme intervention is, thus, considered here a structured pedagogic programme.

Early Grade Reading Study I

In 2015, the Department of Basic Education developed a Grade 1, Setswana reading and literacy intervention called the **Early Grade Reading Study I (EGRS I)** in the North West Province. Considered a highly structured pedagogic programme it offered various learning support materials from graded readers to posters, centralised or ongoing training and, under study here, scripted lesson plans.

In a report by Taylor, Cilliers, Prinsloo, Fleisch & Reddy (2017, p. 23), the intention behind the lesson plans was explained "to strengthen the enactment of the curriculum [as...] they provide detailed specification for each lesson including information on methodology and content to be taught for each instructional day".

Funda Wandé

There are two iterations of Funda Wandé materials under study here – the lesson plans and the, later, teacher guides. Funda Wandé is a not-for-profit, South African organisation that aims to ensure that all learners can read for meaning in their home language by the age of 10 through provision of learner, teacher support materials and capacity development. In 2019, Funda Wandé partnered with the Eastern Cape Education Department to improve isiXhosa reading outcomes across 30 schools in the Eastern Cape province through the Funda Wandé programme.

This, first, Funda Wandé programme was a structured pedagogic programme in that it consisted of three elements: capacity development through in class coaching by reading coaches and support by multimedia classroom videos, lesson plans that provided a day-by-day guide on how to teach reading as well as additional LTSM such as flashcards, alphabet friezes, etc. This was the first iteration of the Funda Wandé programme, piloted in the Eastern Cape, that allowed for the evaluation of the literacy materials and coaches on literacy outcomes. This is the first set of sampled lesson plans from the Funda Wandé programme which will be referred to as the *Funda Wandé Lesson Plans (FW LP)*.

After three years of evaluation and randomised control trials in the Eastern Cape, Funda Wandé expanded its reach to three provinces: Eastern Cape, Western Cape and Limpopo. It further developed, adapted and streamlined its programme and offered it in the respective home languages across each province. The second reiteration of the Funda Wandé programme is more complicated and different across provinces. This version of ‘lesson plans’ sampled here will be referred to as the *Funda Wandé Teacher Guide (FW TG)*.

The table below shows the various iterations of the programme across the three provinces. All iterations are still considered structured pedagogic programmes in that they have a training or coaching support arm, a resource arm and a lesson plan (or teacher guide) arm.

Table 3.1 showing the three iterations of the FW TG programme.

	Lesson Plans/ Teacher Guides	Resources	Coaching/Training/Support
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Western Cape	Teacher Guide (Afrikaans)	Funda Wande LAB Anthologies Big Books	Centralised Subject Advisor (WCED) training. Cascade model – train teachers. (Term 1). Centralised teacher trainings (Term 2)
	Teacher Guide (isiXhosa)		
Eastern Cape	Teacher Guide (isiXhosa)	Funda Wande LAB Anthologies Big Books	Subject specialist coaches
Limpopo	Teacher Guide (Sepedi)	Funda Wande LAB Anthologies Big Books	Centralised teacher training in the use of materials.
		Teaching Assistants (TA's)	TA training in classroom management and pedagogical strategies by designated TA coaches.

Sampled here, however, are the master *English* versions of the teacher guides which were available online. This precludes analysis of the guides as they are found in the majority of classrooms in various African languages. This is less important in the analysis of the *structure* of the lesson plans or teacher guides, however, the analysis of content is limited in its application to English only and would differ markedly in other languages.

3.2.3 Data collection, sampling and the development of an external language of description

This study involves the collection of data (three terms of Grade 1 Home Language lesson plans) from four, initially five, early grade structured pedagogic programmes. The data collection, sampling, extraction, generation of indicators and analysis was conducted in five steps.

- Step 1: Data was collected.
- Step 2: Data was captured and organized into phonic cycles.
- Step 3: Extracted a representative sample using a maximum variation sampling strategy.
- Step 4: Development of an external language of description – classification and framing.
- Step 5: Indicators of effective phonics instruction

- Step 6: Considering the nature of controls against the level of scripting.

These steps are explained fully below.

Step 1: Data Collection

Grade 1 Home Language lesson plans, and teacher guides were gathered from various sources. English versions of the programmes had to be procured to suit the language of the researcher. As such, direct contact often had to be made to individuals involved in the determination of the intervention at the various NGO's or government departments as all but one of the lesson plans were African Home Language, and not English, intervention programmes. Only two of these master English versions were publicly available online.

The sample parameters of Grade 1 and Home Language lesson plans and teacher guides were chosen by convenience, and necessity. The Funda Wandé, Home Language Teacher Guide, at the time of collection, had only been designed for the Grade 1 year. These materials too were made 'just-in-time' and their inclusion was necessary as it was the first instantiation of a teacher guide, as opposed to a lesson plan, in the field of South African, early grade reading interventions. To what extent the teacher guide differed from lesson plans in the sample was of interest in this research and as such its inclusion was necessary and its stage of development set the sample parameters.

The collection of the terms in the Grade 1 year were inconsistent too, and this was due to various unavoidable circumstances. For example, the Funda Wandé lesson plans only had English translations for Term 1 and Term 2. English translations ceased in the third and fourth terms as this iteration of the Funda Wandé intervention was replaced by the Funda Wandé Teacher Guide. The PILO lesson plans for the second term could not be made available from the source from which Terms 1, 3 and 4 were procured. And the Funda Wandé Teacher Guide hadn't yet released their fourth term's teacher guide by the time the data collection of this research had ended. As three terms across programmes were generally collected (and in the case of the NECT programme all four terms), three terms selected for analysis – Terms 1, 2 and 4.

The lesson plans for the EGRS I intervention were dropped from the sample data set because English versions of the Setswana lesson plans were no longer accessible due to a server crash on the part of the Department of Basic Education and Class Act – the stakeholders. The data collection

in general, and the case of EGRS I in particular, raises serious concerns around the availability of master copies of programmes to the public, especially researchers and developers. This is especially the case given these documents are reliant on public and philanthropic funds.

The table below shows the selection of terms across the five programmes in the initial data set.

Table 3.2. showing the terms that were collected across each programme.

	Term 1	Term 2	Term 3	Term 4
PILO	✓		✓	✓
NECT	✓	✓		✓
Funda Wande Lesson Plans	✓	✓		
Funda Wande Teacher Guide	✓	✓	✓	
EGRS I				

Step 2: Capture and organization of data into phonic cycles

A focus on how lesson plans structure *phonics* teaching was decided for a few reasons. Aside from the researcher’s own particular interest in phonics teaching and various phonics programmes, there is general agreement that phonics is to be taught systematically and explicitly. Explicit and systematic instruction is stipulated by the National Curriculum Statement’s (NCS) Curriculum and Assessment Policy Statement (CAPS) and in the literature (Spaull & Pretorius, 2019; Snow et al., 1998) and is considered best practice when inducting young children into the reading code and developing their knowledge of letter-sounds. According to the International Literacy Association’s (2019, p. 1) report, “teaching students the basic letter-sound combinations gives them access to sounding out 84% of the words in English print”. For transparent and shallow orthographies as many African languages, the percentage is higher.

Shalem (2016) describes the expertise that is required for teachers to systematically and explicitly teach phonics. How the lesson plans attempt to guide teachers in teaching phonics explicitly and systematically is an interesting and worthy endeavour.

More than this, however, phonics teaching is a strategy most often observed in practice in typical South African classrooms and one that teachers typically show adherence to in curriculum expectations and in implementation of intervention programmes (Hoadley and Boyd,

forthcoming). Attempts to further structure and enhance phonics teaching through structured pedagogic programmes holds potential for improving early grade reading outcomes.

As such, all phonics' lessons across the various terms that were collected were captured onto an Excel spreadsheet along a format of term, week, lesson, lesson focus, time allocation, resources, contents/concepts/skills, and activity descriptions. It was immediately evident that some lesson plans offered more detailed prescription than others.

It was also evident that many of the lessons that were captured were similar in structure *within* programmes but different across them. The progression of phonics lessons throughout the week were predictable, somewhat, and fairly routinised. For example, it was found that Mondays' lessons followed a particular kind of structure, as did Tuesdays and Wednesdays, etc. within individual programmes but that these predictable patterns differed across programmes.

In thinking forward to possible sampling strategies in the analysis stage of this research and in wanting to achieve a representative analysis of how the lesson plans structured phonics teaching, it seemed that selecting single lessons as units of analysis would yield an inadequate analysis. What appeared across programmes, however, was a supra-structure of progression across lessons dedicated to an individual letter(s)-sound – what I defined as phonics cycles.

A phonics cycle marks a total induction into a letter-sound, from an activity of introduction, through activities of practice or revision, concluding in activities of testing and consolidation – what the ILA (2019) refer to as 'review cycles'. These lessons share an explicit focus in the teaching of a particular letter-sound, and they do not particularly occur across or within a single week. This resulted in the capturing of clusters of lessons that occurred within the same phonics cycle. A total of 145 phonics cycles, or clusters of lessons, were captured across three terms of each of the four programmes according to a format of term, lesson, lesson focus, time allocation, resources, content/concept/skills, and activity description. Clusters were variable, however, and ranged from single lessons to a series of seven lessons. The table below shows the number of phonic cycles in each programme, as well as the total number of phonic cycles within and across programmes.

Table 3.3 showing the total number of phonic cycles within and across each programme.

Programme	1st sampled term	2nd sampled term	3rd sampled term	Total number of phonics cycles per programme:
PILO	10	11	11	32
NECT	7	7	7	21
FW LP	14	10		24
FW TG	30	23	9	63
Total number of phonics cycles across programmes:				140

In order to perform an intensive study of the structuring of phonic cycles, a careful sampling strategy had to be considered.

Step 3: A representative - yet maximum variation – sample for analysis

Generally, a purposeful sampling strategy was chosen with phonic cycles being chosen at quarter intervals of each term across each programme. The intention was to garner a representative sample. The stratified sampling was, however, loosely applied as attempts were made to include instances of phonic cycles that showed some variation from the general or the typical. This is what Cresswell (2007) describes as “employing a maximum variation” sampling strategy.

Four phonic cycles per term were extracted from each of the four programmes resulting in 44 phonic cycles for analysis. It is of the researchers’ opinion that the sample extracted is representative and includes most instances of variation seen within the programmes. This allows generalisable conclusions to be drawn about each programme, but also “elucidates the particular”, and the atypical in each case (Cresswell, 2007, p. 126).

Within the extracted sample, the clusters of lessons in phonic cycles ranged from three to a series of seven lessons.

Step 4: Analysis and coding

In analysing the lesson plan and teacher guide data, Bernstein’s (1975) concepts of classification and framing were applied. In order to use the relatively high-level concepts of classification and framing, the concepts needed to be brought closer to the data, and indicators had to be developed in order to recognise these concepts in the data set (Hoadley, 2007).

‘An external language of description’ for the analysis of the data, hence, was developed (Bernstein, 2000 as cited in Hoadley, 2007). This external language consisted of a set of categories and constructs, or a coding tool, which allowed, firstly, the structuring of the data – to elucidate the ‘controls’ seen in each of the lesson plans – and then, the reading or analysing of the data. This was accomplished “through an interaction between data and theory” (Hoadley, 2007, p. 684).

Bernstein’s concepts of classification and framing formed the initial categories for analysis, and the data suggested recontextualisation, and some adaptation, of the categories. As such a set of 14 indicators, or categories, were developed. Below is a table showing the 14 indicators that were developed for the purposes of analysing these cases of lesson plans and teacher guides.

Table 3.4 showing Bernstein’s categories of classification and framing

CLASSIFICATION	Classification of discourses	Inter-disciplinary relations (the strength of boundary between phonics and other foundation phase subject areas.)
		Intra-disciplinary relations (strength of the boundary between phonics and other reading/writing activities or routines.)
		Intra-intra disciplinary relations (the strength of the boundary within sub-skills of phonics.)
	Classification of agents	Pedagogical subjects (the strength of the boundaries between pedagogical subjects read through prompts guiding teacher’s interactions.)
		Pedagogical subjects (the strength of the boundaries between pedagogical subjects read through prompts for teachers to evaluate.)
EXTERNAL FRAMING	Discursive rules	The extent to which the lesson plan controls the time for transmission of content (pace).
		The extent to which the lesson plan controls the selection of target sounds across the phonics programme (inter-lesson selection).
		The extent to which the lesson plan controls the selection of instructional knowledge in the lesson (intra-lesson selection).
		The extent to which the lesson plan controls the intervention-provided resources within the lesson (selection of learner, teacher support materials (LTSM)).

		The extent to which the lesson plan attempts to control the order of lessons across the phonics programme (inter-activity sequencing).
		The extent to which the lesson plan attempts to control the sequence of order of activity within the lesson (intra-activity sequencing).
		The extent to which the lesson plans regulate the relay of the evaluative criteria (procedural).
		The extent to which the lesson plans make explicit the evaluative criteria (conceptual).
	Hierarchical rules	The extent to which the lesson plan makes formal or informal the social relation between teacher and learners.

The following table shows an example of the indicator developed for the classification of pedagogical subjects. In the table below, classification is used to determine the strength of the boundaries between learners, or pedagogical subjects, seen in the prompts directed to teachers in how they are to evaluate learner performances in activity descriptions in the lesson plans. In other words, in order to determine the differentiation of learner identities, teachers were prompted to ‘read’ and evaluate learner performances in ways that could be communalizing (where there are weak boundaries between learners) or individualising (where boundaries between learners are strong). Using standard Bernsteinian notation, where prompts encourage teachers to mark out and evaluate individual performances or consider individual productions, a C^{++} is noted. Where teachers are given prompts to check learners’ general understanding, where learners’ productions are implied to be homogenous, a score of C^{-} is allocated. This indicator was later extended to include C^0 where no prompts regarding teacher’s evaluations were observed.

Table 3.5 Extract from the coding instrument for analysing the lesson plans in terms of classification

CLASSIFICATION OF PEDAGOGIC SUBJECTS (through evaluations)					
In the way that teachers are prompted to ‘read’ and evaluate learner performances	The extent to which prompts encourage teachers to evaluate in ways that are individualising				
	C^{++}	C^{+}	C^0	C^{-}	C^{--}
	Prompts entail that learner’s productions are read and evaluated in a	Prompts entail that learner’s productions are read and evaluate in a	Prompts do not attempt to control evaluations	Prompts entail that learner’s productions are read and evaluated in	Prompts entail that learner’s productions are read and evaluated in a

and productions.	differentiating manner, in ways that imply individualised learner productions, all or most of the time.	differentiating manner, in ways that imply individualised learner productions, some of the time.	of learner productions.	communalised way some of the time.	communalised way, all of the time.
	Teachers all, or most of the time are prompted to view (read) learner's responses and productions in ways that are differentiating. Teachers are prompted to consider and evaluate individual learner's productions. Prompts such as "mark learners work and make a note of who needs additional support", etc. are evident.	Teachers, some of the time, are prompted to view (read) learner's responses and productions in ways that are differentiating. Teachers are prompted to consider and evaluate individual learner's productions..	Prompts guiding teachers in the evaluations of learner productions are not observed.	Teachers are to 'read' or evaluate learner's responses and productions some of the time, in ways that are communalising, where learner's understandings are referred to as undifferentiated. Prompts such as 'check learners' understanding', as if 'understandings' are homogenous, occur some of the time.	Teachers are prompted to 'read' or evaluate learner's responses and productions in ways that are communalising all of the time, where learner's understandings are referred to as undifferentiated. Prompts such as 'check learners understanding', as if 'understandings' are homogenous, occur most, if not all, of the time.

The external framing of the evaluative criteria refers to the amount of control the lesson plans hold on "the transmission of the instructional knowledge pertaining to the meaning of concepts, principles and their appropriate realization" (Hoadley, 2006, p. 685). Upon looking at the nature of the prompts in the data it became evident that there were two types of control over evaluative criteria in the lesson plans: what I will call procedural and conceptual controls. The table below shows an example of the indicator developed for the external framing of evaluative criteria procedurally.

Procedural controls over evaluative criteria refer to the extent of the explicitness of the prompt to relay evaluative criteria. In other words, the extent to which activity descriptions, using concise and clear prompts, direct teachers to relay appropriate meanings, principles and tasks for realisation. The framing over the procedure of relaying evaluative criteria is of concern here, where $F^{(e)-}$ refers to prompts that place the responsibility of the relay of evaluative criteria onto the teacher. Prompts are thus implicit, and the relay of evaluative criteria is implied. In contrast, strong framing, notated by $F^{(e)++}$, over the procedure of relaying evaluative criteria is seen through explicit and clear prompts, which require no teacher interpretation, only delivery.

Table 3.6 Extract from the coding instrument for analysing the lesson plans in terms of external framing.

EXTERNAL FRAMING OVER DISCURSIVE RULE OF EVALUATIVE CRITERIA (PROCEDURAL)				
In the explicitness of the prompt directing teachers to relay meaning of concepts and principles of their appropriate realisations.	The extent to which the lesson plans regulate the relay of the evaluative criteria, or control “the transmission of the instructional knowledge pertaining to the meaning of concepts and principles and their appropriate realisations” (Hoadley, 2006, p. 685)			
	$F^{(e)++}$	$F^{(e)+}$	$F^{(e)-}$	$F^{(e)- -}$
	Prompts controlling the relay of evaluative criteria are explicit and clear most, if not all, of the time.	Prompts controlling the relay of evaluative criteria are explicit and clear some of the time.	Prompts controlling the relay of evaluative criteria are somewhat implicit and quite unclear.	Prompts controlling the relay of evaluative criteria are implicit and unclear.
	Prompts directing teachers to make the evaluative rules available through exposition are explicit and clear. Prompts to define and explain the meaning of concepts, address key aspects of the knowledge or operation under discussion through questioning and explication, or relaying task instructions, are clear and explicit all of the time.	Prompts directing teachers to make the evaluative rules available through exposition are quite explicit and clear some of the time. Prompts to define and explain the meaning of concepts, address key aspects of the knowledge or operation under discussion through questioning and explication, or relaying task instructions, are quite clear and explicit some of the time.	Prompts implicitly direct teachers to relay evaluative criteria to learners some of the time. Prompts to explain and describe concepts and instructions for tasks are implicit and unclear some of the time. Some interpretation is required on the part of the teacher in enacting the prompt. The teacher controls the relay of evaluative criteria in some instances.	Prompts implicitly direct teachers to relay evaluative criteria to learners. Prompts to explain and describe concepts and instructions for tasks are implicit and unclear. Some interpretation is required on the part of the teacher in enacting the prompt. The teacher controls the relay of evaluative criteria in every instances.

An outline and explanation of all indicators can be found in Appendix A.

Step 5: Indicators of effective phonics instruction.

Throughout the analysis of the controls, realised through classification and framing, the investigation needed to be grounded within the literature on effective phonics instruction.

The report published by the International Literacy Association (ILA) in 2019 which outlines key characteristics of effective phonics instruction (more fully described in the literature review in Chapter Two) was employed to contextualise the various readings of classification and framing and ground these very abstract concepts within recent discussions on effective phonics instruction.

Indicators of effective phonics instruction were drawn from the ILAs (2019) report to ground the external language of description within effective phonics instruction. In sum, five indicators of effective phonics instruction were deemed appropriate and adopted, each of which is outlined and described briefly in the table below. In description, the implications of each are considered in terms of classification and framing. These informed, and were considered throughout, the analysis.

Table 3.7 Five indicators for effective phonics instruction (ILA, 2019) related to classification and framing schema.

Indicator	Brief Description
Explicit and Systematic	The teaching of phonics is to be direct and intentional. In Bernsteinian terms, teachers are to employ a visible pedagogy which is read through strong classification and framing across every dimension. This is particularly evident in the transmission of evaluative criteria where the meanings and rules of concept, such as letter sounds, for example, are made explicit, or stated directly and clearly, and offered up visibly in process of instruction.
Readiness Skills	There is a crucial role in the teaching of a range of sub-skills which make up phonics knowledge. These include ‘phonemic awareness’ and ‘alphabet recognition’ (or alphabet knowledge). Although the content of phonics cannot be discerned through classification and framing, the extent to which these subskills are brought into relation to phonics can be determined through the classification of intra-intra disciplinary relations. One can investigate

	whether phonics is taught as ‘phonics’, or separated out into activities of phonemic awareness and alphabetic knowledge, for example.
Scope and sequence	Phonics instruction is to be systematic and follow an intentional sequence of letter-sounds and words, encouraging progression through the mastery of simple to more complex sounds and words. “Systematic instruction includes a review and repetition cycle to achieve mastery and goes from the known to the new in a way that makes the new learning more obvious and easier for students to grasp” (ILA, 2019, p. 3). These become evident in the data through the clustering of phonic cycles, and whether the controls on the sequencing of the phonics programme is strong. Furthermore, these review and repetition cycles and sequence of progression, however, need to follow a high-utility, fast-paced scope and sequence that allows learners to learn high-utility skills quickly and get them reading and writing words as early as possible. A fast pace of transmission sets the foundations for an effective phonics programme.
Dictation	An effective activity in review and repetition cycles are activities of dictation. The ILA defines this activity as “guided spelling with teacher think-alouds” (2019, p. 4). Dictation offers increased opportunity for learners to “try out” their developing skills to express ideas in written form. The content of programmes cannot be captured through classification and framing, however, the extent to which the activity is ‘guided’ can be read through strong framing.
Reading connected text	Another characteristic of an effective phonics programme is found in the reading of phonic sounds in connected texts. In Bernsteinian terms this may translate as weaker intra-intra disciplinary relations described above where the target sound is integrated into other activities of reading and writing (like phonics practice integrated into CAPS-specified methodologies like group-guided reading). More so, “the tight connection between what students learn in phonics and what they read is essential for building a faster foundation in early reading” (ILA, 2019, p. 5), however this characteristic is reliant on

	appropriate and aligned instructional materials, like the South African Vula Bula reading series which designs reading texts along a carefully sequenced and systematic phonics programme that allows controlled and decodable reading for early readers.
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The following characteristics tabled below, and as described earlier, fall outside of Bernstein’s external language of description as they tell of content which cannot be captured by classification schema. As such, the lesson plans were analysed to the extent that these activities were present (✓) or absent (✗). They were considered activities for effective phonics instruction by the ILA’s (2019) report.

Table 3.8 Four additional indicators for effective phonics instruction (ILA, 2019)

	Description
Dictation	Are ‘guided spelling with teacher think-alouds’ present in phonics lessons? In lesson plans, dictation is usually seen in correction or feedback activities after spelling tests, where the teacher assists students in using these phonics skills. Cannot be classified as a ‘spelling test’ only.
Word Awareness	Mostly facilitated through word building exercises, where students are given a set of letter cards and asked to create a series of words in a specific sequence. Are learners encouraged to work flexibly with letters to form words or non-words, and engage in discussions after examinations of words?
Blending	A central strategy to teach students how to sound out words or string together letter-sounds in order to read a word. Is the modelling of blending sounds into words facilitated by the lesson plans?
High-Frequency Words	The frequent practice of the most common words “needed by students during reading before they have the phonics skills to sound them out” (ILA, 2019, p, 5). Is frequent practice of high-frequency words present? ¹

¹ The practice of high-frequency words is an activity prescribed in phonics programmes for languages with opaque orthographies such as English. However, it is of the researcher’s opinion that the practice of high-frequency words in any language should be practiced to increase learners’ automaticity in their first years of learning to read.

Step 6: Considering the nature of controls against the level of scripting.

In the final stage of analysis, the levels of scripting were considered using the definition of scripting provided by Piper et al (2018) as the number of words given to the teacher to explain what he or she should say.

The words explaining what teachers are to say are seen in activity descriptions. As such, a simple word count of activity descriptions in every sampled lesson in all phonic cycles was determined. These levels of scripting were compared across terms within programmes, as well as between programmes to analyse variation in scripting within and across programmes.

Furthermore, the level of scripting was considered against the extent of controls with an aim to determine the nature of the relationship between the level of scripting and the nature of the controls offered in each case of lesson plans. This entailed that the controls across each pedagogical dimension be summarised and condensed into a single coding, and then compared against the mean word counts of activity descriptions across programmes.

In closing, this chapter presented the theoretical framework and methodology used in this research as well as the development of an external language of description and procedures for data analysis. The results and findings of the analysis are presented in the chapter following, titled *Data Analysis and Presentation of Findings*.

CHAPTER FOUR

DATA ANALYSIS AND PRESENTATION OF FINDINGS

This chapter presents in detail the analysis of the data collected in addressing the following questions: What ‘controls’ do the lesson plans attempt to place on the pedagogic instance across the four cases and how do these controls align to current research on best phonics instruction?

In investigating the question above, focus is maintained using the following sub-questions:

- vi) What regulations are held over the content of phonics in each case?
- vii) What controls are placed over pedagogy in each case?
- viii) How do these controls correspond to the literature on effective phonics instruction as proposed by the International Literacy Association?

Furthermore, and in keeping with current research on the nature of scripting in lesson plans and on the amount of detail required for lesson plans to be effective (Piper et al, 2018), the last set of questions will be determined and investigated:

- ix) What is the level of scripting of each lesson plan?
- x) And, what is the relationship between the level of scripting and the extent of pedagogical control in each case?

4.1. The ‘what’ of phonics instruction

4.1.1. The classification of discourses

The data collected from each of the four programmes was organized into ‘phonic cycles’ as described in Chapter 3. A phonic cycle marks a total induction into a letter-sound, from an activity of introduction, through activities of practice or revision, to testing and consolidation. These sequence of lessons share an explicit focus in the teaching of a particular letter-sound. A total of 44 phonics cycles (four phonic cycles across each term sampled) were coded and analysed, wherein each cycle ranged between three to seven lessons. The aim of the analysis is to draw findings across each programme given that the sample was constructed as representative as described in Chapter Three. Table 4.1 shows a ‘typical’ phonics cycle from each programme, as well as the time prescribed for each activity.

Table 4.1.1 showing ‘typical’ structure of phonics cycles across programmes

PILO (Term 3, week 5)		NECT (Term 2, Week 6)		Funda Wande Lesson Plans (Term 1, Week 7)		Funda Wande Teacher Guide (Term 2, Week 4)	
Phonics - Introducing the sound ‘sh’	30 min	Phonemic Awareness and Phonics : Introduce new sounds and words /qu/	15 min	Phonics: Identify and sound the letter /k/	15 min	Physical Education (indoors): Phonics Song for letter Y	15 min
Phonics - Revises the sound ‘sh’	30 min	Handwriting Qu qu	15 min	Phonics: identify and sound the letter /k/ in new words	15 min	Phonics and Handwriting: The letter Y	30 min
Phonics - testing phonic knowledge	15 min	Phonemic Awareness and Phonics: Segmenting and Blending: words with /qu/ and /v/	15 min	Phonics: Identify and sound the letter /k/ and /e/	15 min	Phonics and Handwriting: Shared word Building: letter y	30 min
		Phonemic Awareness and Phonics: Word Find: /qu/ and /v/	15 min			Phonics and Handwriting: Independent word Building: letter y and p	30 min
		Handwriting /qu/ and /v/	15 min			Phonics and Handwriting: Game	15 min

As is evident, typical phonic cycles from each programme include repetition and review cycles (ILA, 2019) or what is referred to in this work as revision and testing or consolidation activities. Each programme shows a systematic attempt to foster mastery of the target letter sounds, - a characteristic of effective phonics instruction - although, to varying and sometimes inconsistent degrees.

The NECT, PILO and Funda Wande Lesson Plan (FW LP) programmes are the most consistent in their design of phonic cycles, following the same cycling of activities for all target sounds. This has implications for teachers’ uptake and routinisation of the programme, as the cycles are highly consistent and systematic. It was interesting and became obvious that the Funda Wande Teacher Guide (FW TG) is a newly designed programme that is in its first stages of design, as the cycles in Term 1 were highly irregular, but grew in consistency through to Term 3 where the phonic cycles were highly consistent and systematic. This is further seen in the number of phonic cycles across terms in the FW TG seen in Chapter 3, which ranged from 30 phonic cycles in Term 1, to 9 phonic cycles by Term 3.

The PILO programme is unique in that it offers “phonic formal assessment, feedback and support” cycles throughout each term of the programme, where initial lessons are devoted to assessment and testing, and the lesson following is devoted to feedback where it is expected that learners become aware of their mistakes and are guided by the teacher in appropriating the words and

sounds correctly. This formal assessment cycle is a unique feature of the PILO programme and is a characteristic of effective phonics instruction according to the ILA report if one considers the suggestion for dictation activities of teacher think-alouds during guided spelling.

4.1.2 Inter-disciplinary classification

In three of the four programmes, there was strong classification (C⁺⁺) of inter-disciplinary relations. Strong classification of inter-disciplinary relations shows strong boundaries between Home Language phonics and other foundation phase subjects. Only the FW TG showed a weakening of the boundaries between Home Language phonics and other foundation phase subjects where movement (as part of Life Skills physical education) was incorporated with a phonics song. This routine of activities preceded many phonics and handwriting lessons in Term 2 of the TG. This is unsurprising as the TG was designed as an integrated programme (Mtsatse & Verbeek, forthcoming), thus coding C⁻. This was the only instance of phonics and inter-disciplinary integration throughout the four programmes.

Typically, one would expect to find strong classification across foundation phase subjects within programmes such as these as they are Curriculum and Assessment Policy Statement (CAPS) compliant. CAPS separates foundation phase knowledge into four subject areas: Home Language, First Additional Language, Mathematics and Life Skills subjects, showing C⁺⁺ (DBE, 2011).

4.1.3 Intra and Intra-intra disciplinary classification

The CAPS curriculum further separates Grade 1 Home Language into different components of listening and speaking, reading and phonics, handwriting and, lastly, writing (DBE, 2011), ultimately prescribing strong classification of intra-disciplinary relations or between the different activities *within* Home Language. An exception is that the curriculum document, in its description of phonics, states that “phonics and handwriting should be linked as the teaching of the letter-sound and how to write it go together” (DBE, 2011, p. 15). The extent of the take up of these recommendations and boundaries throughout the programmes can be seen in the table below.

Table 4.1.3. showing the classification of intra-disciplinary relations throughout the Grade 1 programmes

Programme	Intra-disciplinary relations	Comments
PILO	C ⁺⁺	Phonics is separated from other reading and writing activities in almost every instance. Only in term 1 are the handwriting lessons aligned to the letter-sound taught in the phonics activity.
NECT	C ⁺	Although phonics and handwriting are listed as separate activities throughout the phonic cycles, there is a consolidatory relationship between them, until the last lesson of consolidation where phonics is subsumed into the handwriting lesson entirely thus weakening the intra-disciplinary relations (C ⁻). Ultimately NECT shows C ⁺ .
FW LP	C ⁺	Handwriting and phonics lessons cover the same letter-sound each day. Phonic words are consolidated during group guided reading's independent activities only in the first two sampled phonic cycles of the year. Generally, intra-disciplinary relations are strong.
FW TG	C ⁺	"Phonics and handwriting" appear as the lesson topic in almost every instance; however, their activities remain distinct, with phonics activities taking up the first half of lessons with handwriting activities as consolidation occurring at the end of each lesson.

An important case can be made for the weakening of classification of intra-disciplinary relations in considering Moss (2010) argument for a contextualised phonics programme, where phonics is reinforced in other elements of early learning programmes. This is seen, too, in the ILA's (2019) recommendation for phonics programmes to allow learners to 'read connected texts'. This suggests that classification of intra-disciplinary relations should be weaker across all programmes.

Three of the four programmes showed strong classification between intra-disciplinary relations. PILO showed the strongest boundaries between intra-disciplinary relations as the phonics and handwriting programmes were not aligned and *in almost every case followed a different sequence of target sounds*. Although the handwriting and phonics lessons either occurred together in almost every instance, as in FW TG, or were aligned in the letter-sound focus (as in FW LPs), phonics and handwriting were still conceptualized as distinct activities. Only in NECT was the assessment of phonics (more particularly the assessment of sound, i.e. phonemic awareness) intended during

a handwriting lesson showing slightly weaker classification between handwriting and phonics as phonics was subsumed into the handwriting programme. The intra-disciplinary relations between different components, i.e. handwriting and phonics, were weaker. This only occurred, however, in the last lesson of each phonics cycle, hence NECT's intra-disciplinary relations remain strong.

The instance above shows phonics (phonemic awareness) subsumed into the handwriting lesson meaning weaker intra-disciplinary relations. It also shows an instance of strong intra-intra-disciplinary relations between phonics and other phonic-related activities. Phonics relies on the knowledge or acquisition of sub-skills namely alphabetic knowledge (knowledge of letter(s)) and phonemic awareness (knowledge of sound(s)). Together these are brought into relation to one another to constitute phonics instruction. Where the range of these subskills of alphabet knowledge and phonemic awareness are taught marks out an effective phonics programme, according to the ILA (2019). The classification of intra-intra-disciplinary relations exposes whether phonics and its “readiness skills” (ILA, 2019, p, 3) are marked out and their sub-processes made explicit.

The NECT programme titles every phonic lesson as “phonemic awareness and phonics” showing phonics and its sub skills as distinct and separate in instruction. Thus, it is the only programme of the four that codes for strong intra-intra-disciplinary relations (C⁺⁺).² PILO, FW LP and FW TG showed weak classification of intra-intra-disciplinary relations as lessons were titled ‘phonics’ in every instance.

An interesting issue emerges in looking at the boundaries (classification) of what is included as phonics and isn't; the coherence or incoherence of what is called phonics; what is prescribed in the lessons as shown by activity descriptions. There was one phonic cycle in NECT's Term 1, Week 2 where what was titled ‘Phonics and Phonemic Awareness’ was, in activity description, an introduction and revision of class rules – a routine established to orient new learners to the year's classroom. This incoherence however, happened more often throughout the Funda Wande TG where ‘Phonics’ and ‘Phonics and Handwriting’ lessons in Term 1 covered topics as ‘Introducing YES/NO questions’, story sequencing and rapid number recognition, to name a few. No

² Only one lesson in PILO – and not part of the sample – titles its first phonics lesson as “phonics – phonemic awareness”, in only one instance and so the programme generally codes as C⁺⁺ in intra-intra-disciplinary relations.

discernable connection or relation to phonics was evident in the analysis of activity descriptions despite the lesson being allocated to phonics instruction. This may have implications for teacher's and learners' understandings and conceptualisations of phonics and phonics programmes, and considering the ILA's (2019) direction that effective phonics instruction is to be explicit, this incoherence of content may have consequences for the extent to which phonics is taught explicitly.

Bernstein's concept of classification of discourses is useful in analysing the boundaries that manifest in each of the lesson plans, in demarcating what counts as phonics in terms of organisation rather than content. Thus, and in addition, I have considered the content of the classification in terms of the absence or presence of 'readiness skills', 'blending', 'dictation', 'word awareness' and 'high frequency words' (content features of effective phonics programmes). The content is analysed as to whether the activities prescribed by the ILA in effective phonics instruction are present (✓) or absent (×). See table below.

Table 4.1.3. A table showing a summary of the classification schema and content of activities in phonics cycles across each case.

	PILO	NECT	FW LP	FW TG
Classification				
Inter-disciplinary relations	C ⁺⁺	C ⁺⁺	C ⁺⁺	C ⁻
Intra-disciplinary relations	C ⁺⁺	C ⁻	C ⁺	C ⁺
Intra-intra disciplinary relations	C ⁻⁻	C ⁺⁺	C ⁻⁻	C ⁻⁻
Content				
Blending	✓	✓	✓	×
Dictation	✓	✓	×	×
Word Awareness	×	✓	×	✓
High Frequency words	×	×	×	×

The NECT programme offers the most activities (content) in line with the recommendations in the ILA (2019) report. NECT offers activities of blending which are made explicit, and the teacher is given explicit guidance on how to model blending to learners. The explicitness of blending activities are seen in prompts such as: "Write the word on the chalkboard: sat. Model pointing and

blending the sounds to make a word: /s/ – /a/ – /t/ = sat. Repeat this with a word from the Wednesday lesson: pat”.

Activities of dictation, or ‘guided spelling with teacher think-alouds’ follow each spelling test seen in handwriting lessons throughout the NECT, although, the PILO lesson plans are more explicit in their guidance offered to teachers in doing dictation with learners. This is further explored in the external framing of intra-sequence of activity seen later.

Word awareness activities, which take the form of word building are seen in the NECT and FW TG programmes. The FW TG has two types of word building activities: shared and independent word building activities that further develop learner’s word awareness. This is the only activity that the FW TG scaffolds explicitly for teachers. Much of the phonics activities in the FW TG are implicit throughout the teacher guides, even more so in Term 3, and left up to teacher discretion and expertise.

Interestingly, the practice and revision of high-frequency words was not seen throughout any of the four programmes. High frequency words require frequent practice particularly in Grade 1 so that learners can recognise the most common words as they start to read and before they have the phonic skills to sound them out (ILA, 2019).

The analysis of phonics content, here, is brief as the types of phonics activities will differ across various languages with different morphological complexities (Department of Basic Education, 2020; Ardington, Wils, Pretorius, Deghaye, Mohohlwane, Menendez, Mtsatse & Van der Berg, 2020). The criteria for an effective phonics instruction as recommended by the ILA is for an English phonics programme and so conclusions are drawn cautiously. In particular, practice of sight words are not relevant to most African languages due to their transparent orthographies, and it is thus appropriate that they are absent in the programmes. However, with regards to high frequency (not sight) words, practice of high frequency words may still be beneficial across all languages for young readers new to decoding. Attention is, now, turned to the classification of agents, or pedagogical subjects.

4.2 Classification of pedagogic subjects – the extent of prompts encouraging differentiation through interactions and evaluations.

It is possible to discern the boundaries between pedagogical subjects through the prompts in activity descriptions that attempt to guide teacher's interactions with individual and groups of learners, in the first instance, and secondly through the ways in which teachers are to evaluate learners' productions, either individually or collectively as a class.

C⁺⁺ shows prompts that encourage teachers to interact with learners: to direct tasks, to ask questions, etc. in ways that are individualising in most to every instance. The extent to which prompts encourage teachers to direct their interactions to the whole class where learners are imagined as a homogenous group in every instance shows weak classification between pedagogical subjects (C⁻). The second classification of pedagogical subjects can be discerned through prompts that direct teachers on how they are to 'read' or evaluate learner productions. C⁺⁺ shows strong boundaries between learner's productions and suggests an individualising pedagogy, where C⁻ prompts evaluations of learner productions produced collectively.

Analysis of each programme will be dealt with in turn, and then general comparisons drawn across all four programmes. Presentation of the analyses is shown across the three stages of one phonic cycle: introduction (usually oral and expository); revision or practice (usually oral with a written component) and consolidation or testing (usually written).

PILO

In the introduction activities of the phonic cycles all phonics lessons took the form of whole class activities in the PILO lesson plans. There were many prompts for teachers to direct questions and tasks to individual learners or groups in expository lessons, thus scoring C⁻. Some expository lessons scored C⁺ after the inclusion of a prompt stating that the teacher should "ask as many *individual* learners to clap the syllables as time will allow" shifting the majority of the lesson toward interactions between individual learners and the teacher. Evaluations during expository type lessons of introduction and revision of phonics, included prompts such as "ask learners if they can identify other words that contain that sound – *repeat the words emphasising the sound*", and ask learners to give you some words that contain these sounds, *making the sound clear when they say the word*. These prompts attempt to encourage teachers to 'read' responses, engage with

responses, and reflect correct productions back to the whole class. These prompted evaluations, too, produce C^- boundaries between pedagogical subjects as ‘learners’ as a single unit are referred to in each case.

In the second and revision parts of the phonic cycles prompts differed across terms. In term 1, there was a revision activity where learners were to draw spider diagrams representing the blending of sounds. There were, however, no prompts directing teachers to evaluate these written activities, scoring C^0 . A score of C^0 shows that the lesson plans do not attempt to control the evaluations of learner productions. In term 2’s revision lessons, there was a shift towards a more individualising form of prompted evaluations (C^+). Learners were to write sentences using the week’s spelling or phonics’ words and teachers were prompted to mark these productions post-activity. More than this, teachers were instructed during-activity to “walk around [as learners are writing] and ask individual learners to read the words they have written”, thus, encouraging teachers to engage with learners on an individual basis and monitor individual proficiency.

The final, test activities of the phonics cycles always followed an undifferentiating pedagogical strategy throughout the PILO lesson plans in the form of informal spelling tests. Along the dimension of teacher and learner interactions, the lesson plans coded (C^-), but along the dimensions coding teacher’s prompts to evaluate, the lesson plans had differentiating evaluation prompts where teachers were to “collect learners writing books and note those learners who got more than half of the words incorrect so that [he/she] can give them support”. This is an instance of a highly differentiating and formative procedure (C^{++}).

NECT

Across activities of introduction, revision and assessment, whole class undifferentiating interactions dominated the prompts in NECT’s activity descriptions resulting in implied communal pedagogic identities (C^-), making up 92% of interactions throughout the lesson plans. Explanations, instructions and questions were always directed to “learners” and teachers were not encouraged to differentiate their interactions with groups or individuals, except in *one* case. Consider this case below from Term 4, Week 8, Wednesday:

Figure 4.2.1. An example of strong boundaries between pedagogic subjects through prompts to interact and evaluate.



Phonemic Awareness And Phonics:15 minutes

Revise words

REVISE WORDS

- 1 Have all the phonic words flashcards ready.
- 2 Hold up each word and ask a different individual learner to read it.
- 3 If a learner cannot read a word, help the learner to sound out the word.

In this revision part of the phonic cycle, teachers were prompted to interact with and direct questions to only one learner at a time. This instance was the only case where the *evaluations* of individual pedagogical subjects (C⁺⁺) was seen in “if they cannot read a word, help the learner...”, prompting the teacher to evaluate learner productions and correct. Prompts to evaluate learner’s oral responses during introduction activities were largely absent, however, and the general score for the NECT lesson plans were C⁰.

In lessons of practice or revision such as in Word Find activities or Segmenting and Blending activities, teacher interactions were undifferentiating and directed to the whole class in every instance. Evaluations of written work were encouraged though, as a communal activity, with learners marking their own work while being guided by the teacher. Teachers were not prompted to mark these themselves, however, resulting in their staying “blind” to individual learner productions (C⁰).

In the final consolidation or testing lesson of the phonics cycle, interactions remained whole class and took the form of a spelling test. Similar to PILO’s (C⁻) dictation exercise, teachers were required to “collect learner books at the end of the day and make a note of who needs additional help”, scoring C⁺⁺ as this exposes the teacher to individual learner productions.

Funda Wande Lesson Plans (FW LPs)

In the introductory lessons to the phonic cycles, there were no prompts or references for teachers to evaluate oral responses, scoring C⁰, generally. Out of a sample of eight phonic cycles (four cycles across two terms), there were only three instances which implied some sort of *evaluation*, scoring C⁻. These included prompts such as, “repeat the response” encouraging teachers to repeat and reflect the correct responses back to their learners, implying that teachers are to determine

correct responses first. These expository oral sessions were whole class, and there were very few instances where the teacher was prompted to ask individual learners questions. “Learners” were always referred to as a homogenous group, thus weakening the boundaries (C^-) between pedagogic subjects through the teacher’s *interactions*.

During the practice or revision lessons, which largely included writing activities in DBE workbooks, teachers were prompted to “go around making sure learners are doing the work correctly”, implying individual evaluation processes (C^+). Before the writing activities in learner’s DBE workbooks, there was generally an oral task in which the teacher was to “check learner’s understanding” where ‘understanding’ was written as singular, implying that learners held one collective understanding, scoring C^- in both *interaction* and during *evaluation*.

In the last and assessment part of the phonic cycles, however, activities were highly individualized. For example, learners were to come up to the front and place a flashcard of a word under the correct phonic, and the teacher was prompted to evaluate and question the learner’s [incorrect] choice. This scores C^{++} in both interaction and evaluation as it creates boundaries between individual learner identities. Another common testing activity required learners to, at their desks, match letter sounds individually using personal letter cards and hold the correct card up to the teacher for evaluation (C^{++}). Teachers were also encouraged to “observe and identify the learners who struggle to match the sound and letter”. 100% of the testing activities throughout the representative sample analysed drew strong boundaries between pedagogic subjects, which was, too, encouraged by activities that allowed public individual performances.

Funda Wande Teacher Guide (FW TG)

The FW TG is an interesting case. Unlike the other three programmes, the FW TG was designed just-in-time and after consultations with various stakeholders (subject advisors, subject coaches or experts, teachers, etc.) (Mtsatse & Verbeek, forthcoming). Due to the variable nature of the structure and design of each term’s guide, the analysis of the data is best presented term to term as there was no consistent coding score across terms.

Table 4.2.1 showing the classification of pedagogic subjects through teacher's prompted interactions and evaluations across the three terms in Funda Wande's Teacher Guide

	Term 1	Term 2	Term 3
Classification of pedagogic subjects by prompted interactions	C ⁺⁺	C ⁺⁺	C ⁰
General conclusions	The teacher was prompted to interact with the whole class in all but one instance.	The teacher was prompted to interact with the whole class in all but two instances.	Due to the lack of activity descriptions, it was difficult to determine whether activities were to be directed to whole class or toward individual learners.
Classification of pedagogic subjects by prompted evaluations	C ⁰	C ⁰	C ⁰
General conclusions	Prompts to evaluate were not evident in half of the lessons analysed. Where prompts to evaluate were evident they took the form of whole class (C ⁺⁺), self-assessment in the form of "Let's check", but these only occurred in 29% of lessons in Term 1's sample.	In 71% of lessons analysed, no prompt to evaluate, and as such no classification between pedagogic subjects, could be discerned, except in lessons titled Dictation (spelling test).	Prompts to evaluate were absent across 76% of lessons. If prompts were evident they were vague, as in "teacher checks", so that the classification between pedagogic subjects could not be determined.

In most expository or introductory lessons within the FW TG phonic cycles, interactions between the teacher and his/her pedagogic subjects were of a whole class nature. This was discernable through the use of photo thumbnails that show the teacher teaching to the whole class. Prompts described pedagogic subjects as "learners" implying learners as a homogenous group. The nature of the script, or the wording of activity descriptions, is different than that seen in the other three programmes (this will be discussed later in the chapter) in that the script follows a list of, mostly, questions in direct speech that the teacher is to ask or in statements he/she is to say (as in "Let us..."). The questions or statements are, very often, not framed with instructions on how or how many of, or who of the learners to ask. This occurs more often throughout the programme, until in

Term 3 it becomes increasingly difficult to discern the classification of pedagogic subjects through prompted interactions, because there are no elaborated activity descriptions in the sample analysed.

In few instances in Terms 1 and 2 were boundaries between pedagogic subjects strengthened to score C⁻ as learners were tasked to interact in pairs, or individually. These included scripted questions as “who volunteers to read this word”, or activities designed to be completed in pairs. However, these were always dominated by whole class interactions between teacher and taught, generally showing weaker boundaries between pedagogic identities (C⁻).

Few prompts to evaluate were identified throughout the programme. These are listed below.

- *Teacher checks*
- *Let's check. One learner writes word on the board.*
- *At the end of the day, hand in your books for marking.*
- *... provide answers.*

In 68% of lessons, across all phonics cycles from Terms 1 through 3, there was no evidence of prompts for evaluation (C⁰). As such it was not possible to determine the kinds of imagined pedagogic subjects as differentiated or homogenous, despite the prompts being present. The Funda Wande teacher guide is not seen to place strong controls on the classification of pedagogic subjects and yields this to the discretion and expertise of the teacher.

The classification of pedagogic subjects in discerning individualising or collectivising pedagogies, in how teachers are prompted to interact with individuals or groups of learners, or prompted to evaluate individual or collectively produced learner performances are summarised in the table below.

Table 4.2.2 showing a summary of the classification of pedagogic subjects through teacher's prompted interactions and evaluations across each case of lesson plans.

Classification of pedagogic subjects through...	PILO	NECT	FW LP	FW TG
Teacher's prompted interactions	C ⁻⁻	C ⁻⁻	C ⁻	C ^{--/0}
Teacher's prompted evaluations	C ^{++/0}	C ^{+/0}	C ^{-/0}	C ⁰

All programmes showed generally weak classification of pedagogic subjects through the teacher's prompted interactions, thus encouraging a communalising pedagogy in phonics lessons. Phonics teaching is usually prescribed as a whole class teaching activity (DBE, 2011) so this was unsurprising. The FW LPs showed the most attempt at encouraging teachers to interact with individuals and groups of learners rather than the whole class. This was particularly seen in the testing lessons of the phonics cycles where the FW LP was unconventional and didn't follow typical dictation or informal spelling test procedure, and rather prompted teachers to ask learners to come up to the board individually with flashcards of letter-sounds, for example.

A common trend seen across lesson plans was the general lack of prompts directing teachers to evaluate learner performances in ways that were differentiating or individualising (C^0). PILO showed the most prompts that directed teachers to consider individual learner performances, seen in lessons of dictation where teachers were told to mark learners' work and consider those learners who needed additional support. Generally, however, lesson plans did not attempt to control teacher's evaluations of learner productions or performances – a concerning find.

There are two points that need to be made. The first is the necessity for prompts to guide teachers to *evaluate* learner performances and productions. "For effective literacy acquisition, children need explicit instruction and cannot be expected to independently discover the rules of written language by themselves" (Nazaryan, 2014 as cited in Hoadley & Boyd, forthcoming). Explicit instruction, elsewhere akin to notions of 'visible learning' (Hattie, 2009 as cited in Hoadley & Boyd, forthcoming), entails that teachers are to formatively evaluate learner responses and provide feedback. In Hoadley's (2018) investigations of classroom-based practice in typical South African classrooms, it was found that teachers did not evaluate learner performances or provide explicit and timeous feedback that would make the rules of written language explicit for learners – a phenomenon known as zero pedagogy: where evaluative criteria were absent in pedagogy. Lesson plans could mitigate this by attempting to control evaluations.

Furthermore, there is the need for prompts to guide teachers to evaluate learner performances in ways that are *individualising* (C^{++}). Research has identified the importance of an individualising pedagogy that marks out individual performances and tailors instruction to the level required by learners or groups of learners (Hoadley & Boyd, forthcoming). Hoadley (2018) and Muller and Hoadley (2019) report on the dominance of communalising pedagogies (seen in the weak

classification of pedagogic subjects, or C⁺⁺) in typical South African classrooms where there is the distinct lack of individualised evaluation that would lead to greater learning. These, too, could be controlled by prompts in lesson plans that would encourage teachers to evaluate learner performances in increasingly differentiated ways. A missed opportunity in these four cases of lesson plans, indeed.

In the following section, I turn to the structure of *pedagogy* as imagined in, or controlled by, the lesson plans. This analysis will first turn to an analysis of the social relation as controlled by the lesson plans, in how social identities are imagined through prompts seen in activity descriptions. This is the order of conduct out of which instructional knowledge is transmitted and acquired in the pedagogical relation, and it can be described using the framing of hierarchical rules as strong or weak (Bernstein, 1975).

4.3 The ‘how’ of phonics instruction – framing of hierarchical rules.

The lesson plans exert control over the social relation between teacher and learners in how they frame the nature of the pedagogical relation and the pedagogical act. This indicator of analysis is not investigating whether the lesson plans control the hierarchical rules or not, although that is a worthy endeavour (evident later), it is rather showing the strength or the positionality of the teacher in the social relation as discerned through the lesson plans. In some cases, prompts are couched in language that encourage teachers to work indirectly on learners where the act of teaching appears hidden or masked, in terms such as “brainstorm with” or collaborate, where teachers are discerned to be equal to, or more personal to, learners in the act of transmission. In other cases, the teachers’ authority is asserted through action words like “teach”, “tell” or “explain”, where he/she is prompted to act directly on learners, with some authority. Where authority is unmasked, F^{(e)++} is scored, and where it is masked, and attempts made so that the teacher’s authority appears hidden, F^{(e)--} is scored.

In the PILO and Funda Wandu lesson plans the hierarchical rules are strongly framed. The lesson plans encourage a hierarchical social relation in which the teacher is the clear pedagogical authority. Throughout the lesson plans, action verbs directing teacher’s actions are those as “tell”, “talk about”, “get learners to”, etcetera. In some cases, and in revision lessons, prompts such as “remind”, “assist”, “guide the learners through the activity” are used, but usually the teacher is expected to work on the learners directly.

The NECT lesson plans show weaker framing of hierarchical rules, as activities are framed in language that is collaborative. Prompts such as “discuss”, “model” or “brainstorm with learners” are used. Only in consolidation or testing lessons which take the form of a traditional spelling test, are verbs such as “instruct”, “tell” and “call out” used, showing stronger framing of hierarchical rules, but generally NECT scores F^(e)⁻.

In considering the Funda Wande Teacher Guide, it became increasingly difficult to discern the social relation between teacher and taught as imagined in the guide. This was due to the very different nature of the prompts that were in the TG as opposed to the other three programmes. The PILO, NECT and the FW LPs all use indirect speech prompts to guide teachers. In doing so, the prompts typically provided descriptors for the act of teaching through which one could discern the imagined pedagogical relation, although subtly.

In contrast, the FW TG generally scripted only what teachers should say, in the direct speech, and not how teachers are to deliver them. Thus, the nature of the social relation was not controlled. Consider the excerpts below and notice how the control over the social relation is absent in the TG compared to the NECT programme below it.

Image 4.2.1. An excerpt from the Funda Wande TG showing direct speech prompts which relay what the teacher is to say.



Image 4.2.2. An excerpt from the NECT lesson plans, below, showing the indirect speech prompts guiding the teacher's voice and actions. The prompts show strong framing of hierarchical rules through action words like "instruct".

LEARNERS DO

- 1 Tell learners to open their exercise books and write the heading: I, II
- 2 Instruct learners to begin writing.

Image 4.2.3. A further extract from the NECT programme showing both weaker hierarchical rules in action words like "brainstorm with" and "discuss" made possible through the indirect speech prompts guiding teachers' voice and action.

- 3 Discuss how the sound /ll/ sounds the same as the sound /l/ but you will never find this at the beginning of a word.
- 4 Ask learners: Can you think of words that end with /ll/?
- 5 Brainstorm words with learners, like: **ball, fall, wall**

The nature of the variable scripting will be considered later under the discussion of scripting. Here, the focus was on the imagined nature of the social relation subtly discernable through the activity descriptions that attempt to control teacher's actions as well as their voice. It is interesting to consider how each of the programmes describe pedagogical acts – if in fact they do that at all as in the case of FW TG where the social relation is controlled only by the teacher.

I turn now to the external framing of discursive rules.

4.4 The 'how' of phonics instruction – framing of discursive rules.

Framing is used to analyse the control over the discursive rules – or the rules of communication – over how the instructional knowledge is to be transmitted in the pedagogic instance. Because the lesson plans place control over the pedagogic instance through attempts to control the selection, sequencing, pacing and relay of evaluative criteria from outside of the relationship between teacher and acquirer, framing is always considered as external $F^{(e)}$, but will be referred to here as 'framing'. The framing over the selection, sequencing, pacing as well as the evaluative criteria will be taken in turn.

4.4.1. Control of time (pace)

Turning toward the control of time, originating from Bernstein's theory on the framing of pace, it has been well established that lesson plans intend to exteriorize curriculum by stipulating time demarcations for activities. The external framing of time refers to the control the lesson plans hold over time to **control pace** in pedagogy. The strongest controls on time come from both inter-

activity (most commonly seen) allocations of time, demarcating time between lessons or periods, alongside intra-activity allocations, which govern the amount of time spent on tasks *within* lessons.

The Funda Wande Teacher Guide (FW TG) showed the strongest control of time ($F^{(e)++}$). The TG allocated time controls between activities as well as within or intra-activity. See the extract below from Term 2's teacher guide.

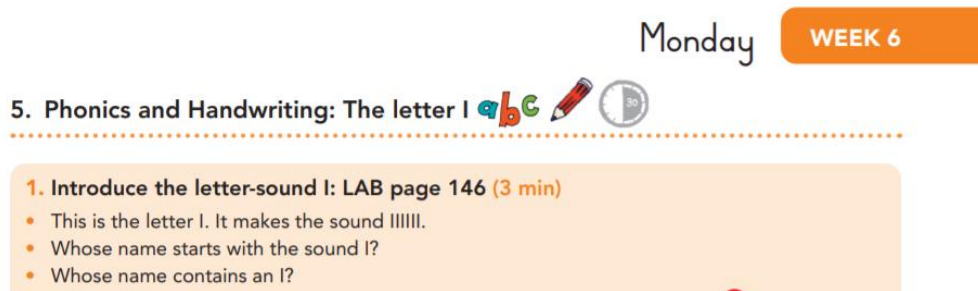


Figure 4.4.1. An extract from the Funda Wande Teacher Guide (Term 2) showing both inter-activity and intra-activity controls on time.

The teacher guide allocated 30 minutes (shown by the clock icon) to Phonics and Handwriting on Monday, Week 6. It allowed 30 minutes to be spent on the letter I (an introductory lesson), before the teacher is to move onto the next lesson. In addition, labelled step “1. Introduce the letter-sound I: LAB page 146”, teachers are instructed to spend only three minutes on this intra-activity step. In other words, three minutes of the 30 minute lesson is on introducing the target phonic. Of the 51 lessons coded across the FW TG, 88% of these displayed intra-activity time controls, coding $F^{(e)++}$.

Across the remaining three programmes, $F^{(e)+}$ was scored, as only inter-activity demarcations of time were evident, and consistently so, across PILO, NECT and the Funda Wande Lesson Plans (FW LP). But in all cases, in every instance, there were controls on time.

The concept of the framing of pacing is the control over the rate of transmission of content or knowledge rather than how much is covered. The notion of coverage addresses the rate at which target sounds are covered. Rastle (2022) critiques the coverage of phonics in the CAPS curriculum, to which these lesson plans and guides are aligned, as being too slow, and that faster pacing would yield superior outcomes. Faster pacing would allow learners to build decoding skills and fluency earlier in their schooling careers. The CAPS curriculum specifies that two letter-sound

correspondences be cycled through each week, and this is consistent across the lesson plans and teacher guides, here, too.

4.4.2 Control of selection

Lesson plans attempt to control the selection of various dimensions in the pedagogical instance. They control to different extents what content or phonic sound is covered (what is here called inter-activity selection), what content or representations of the phonic sound are to be relayed (intra-activity selection) as well as what learner teacher support material (LTSM) is used throughout the lesson in the transmission of these representations (here called, selection of LTSM).

The external framing of selection will always be strong, as the lesson plans stipulate what instructional knowledge (or phonic) is allocated to any unit of time. It is rare that control over this kind will be weak or $F^{(e)-}$ in lesson plans. PILO, the FW LPs and FW TG control the selection of the phonic in every instance throughout their lesson plans.

The NECT lesson plans, however, show strong and weak external framing simultaneously in that they prescribe a phonics programme, or control the selection of a particular phonic to be covered during the day's lessons throughout the year ($F^{(e)++}$), but they also allow teachers to use an alternative phonics programme in the accommodation seen below.

Image 4.4.2.1. An excerpt from the NECT programme (Term 1, Week 6) accommodating other phonics programmes.

ALTERNATE PHONICS PROGRAMME

Sound/s: _____

Words: _____

WEEK 6

The external framing of selection (intra-activity), as mentioned earlier, is the area in which lesson plans tend to yield control to teacher autonomy, discretion and perhaps creativity. In phonics teaching, the sound is learnt through the use of examples of words that possess the sound or the spelling pattern. These examples form the representations of the letter-sound that is to be transmitted, and whether these representations are controlled by the programme or not is of concern here. Typically, all of the programmes showed $F^{(e)++}$ or strong framing of intra-activity selections of phonic representations. These will each be discussed in turn.

In the English versions of PILO Term 1, the framing of intra-activity representations were largely inconsistent and uncontrolled. In only one phonics cycle sampled, in the first lesson and in the lesson covering the sound /m/, were the various representations seen in an illustration to a written activity in the lesson plan. In other words, a spider diagram of the sound /m/ and several words containing this sound were illustrated to guide the teacher in helping learners complete this activity. Thus, the framing of intra-activity selections scored $F^{(e)++}$.

However, there were no illustrations for this activity in later weeks, and the depiction for /m/ was simply recycled, and as such the representations of letter-sounds were no longer relevant to sounds /b/ or /o/, for example. Representations were at the discretion of the teacher and the framing was weak ($F^{(e)-}$) throughout the term's lesson plans. This is not to say that the *programme* did not control representations - through the use of flashcards or spelling word booklets - but these were not reflected or controlled by the *lesson plans*.

There was much more consistent and stronger framing of intra-activity selections across Term 2 and Term 3 in PILO, however, where explicit reference was made to a list of spelling words. As such, the representations of letter-sounds were provided. In some cases, where $F^{(e)+}$ is scored in Terms 2 and 3, the teacher was tasked with creating two sentences with each spelling word and these sentences weren't scripted.

Within the NECT programme, lesson plans showed very consistent scoring of $F^{(e)++}$ across the phonic cycles, except in one case which will be elaborated later. Generally, all representations of the letter sound are controlled in that they are scripted into activity prompts, such as "brainstorm words with learners: like mother, mom, man and mouth".

The Funda Wande Lesson Plans are similar to the NECT's in that the lesson plans control the representations of the phonic sounds in prompts titled 'preparation for the lesson' in which sentence examples are listed, under resources in which words are listed and in activity descriptions where exact examples are provided. Only in introductory lessons, was there one example of weak external framing over intra-activity selection, and this will be discussed later.

The Funda Wande Teacher Guide showed strong framing of intra-activity selections. This was seen through an aligned learner activity book which provided representations in every case, and these representations were reflected in the TG using thumbnails of the pages in the learner activity

books. The use of phonic songs were encouraged and controlled using a WhatsApp bot which the teacher was prompted to WhatsApp and play aloud to the class. Words and examples were controlled in every instance, except one. See below.

The following prompts were seen across introductory lessons to phonic sounds across all programmes, and these have implications that are worth investigating as they all showed weak external framing of intra-activity selections of representations:

PILO	NECT	FW TG	FW LP
• Ask learners if they can identify other words with the sound – repeat the words emphasising the sound.	3. Ask learners: Can you think of words that begin with /sound/?	▪ What other words start with this sound?	▪ Ask the learners to suggest words with the sound /sound/.

The weak external framing ($F^{(e)-}$) seen above in which teachers are instructed to ask learners for representations of phonic sounds releases the lesson plans' control of representations, but more than this, it yields control over the examples of words that contain the phonic sound momentarily to the learners. This, too, correlates to weak [internal] framing in these pedagogic instances. This *may* have positive implications for learner participation and contextual sensitivities but it also opens up the space for teacher and learner error and the production of inappropriate representations – more commonly in opaque orthographies like English. Barbash (2012) warns against the lack of controls over intra-activity selections and teacher inputs and supports the full scripting and control of these as they eradicate ambiguous communication or the 'mis-presentation of rules or concepts'. Barbash is a major proponent of programmes that utilise 'direct instruction', or fully scripted lesson plans that see $F^{(e)++}$ across all pedagogical dimensions for all subjects.

Consider this second example: In PILO's introductory lessons of the phonic cycles, the plans intend for teachers to provide and seek out their own pictures and objects for each sound. The plans state that teachers are to "show learners pictures of objects, or real objects where the word contains the sound, and ask learners to name these objects". However, the plans do not provide the pictures or a list of objects in the lesson plans, scoring $F^{(e)-}$. Possible design explanations for this may be to concretise the induction into a particular letter sound or to make this step more context appropriate – whichever case is not of concern here. What is of relevance are the particular

implications this choice may have on teacher's uptake or what this release of control may mean for enactment. Piper (2018) argues that activities of this kind, that require more from the teacher in terms of his/her time and resource, often lead to omission of the lesson step. It also makes assumptions about teachers and it may give rise to incorrect presentations of the rule to be transmitted (Barbash, 2012). It may open up space for teacher autonomy and creativity but also teacher fallibility and mis-presentations.

I turn now to the external framing over the selection of resources and this is of particular interest because the lesson plans under analysis here are one component of structured pedagogic programmes. They structure pedagogy through the provision of lesson plans, training and resource provision. The control over resources (both particular to the programme and not), how the resources are incorporated into, or how their use is scripted into the lesson plans is of concern here. Where neoteric or intervention provided resources are scripted in every instance, $F^{(e)++}$ is scored, where neoteric resources are incorporated into lesson plans some of the time, $F^{(e)+}$ is scored, and where $F^{(e)-}$ is scored, no intervention resources are scripted despite their intended use.

Intervention-provided resources were strongly framed in every instance. This is, largely, an unsurprising finding in that these lesson plans are part of literacy intervention programmes that intend for teachers to change their practice by incorporating new resources while enacting scripted pedagogical strategies.

Below is a table showing the kinds of resources that were intended for use during the phonics lessons across programmes and these were stipulated in every case of use ($F^{(e)++}$).

Table 4.4.2 listing the resources used in phonics lessons across the four programmes

PILO	• Flashcards of phonic sounds • Objects/ Pictures of objects • Blackboard • Photocopies of spelling lists • Exercise books (general, homework and assessment)
NECT	• Flashcards • Alphabet Frieze • Phonics Display Board • Chalkboard • Exercise books

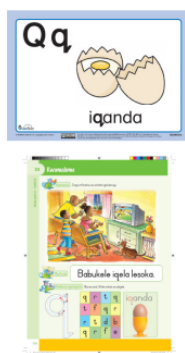
FW LP	• Vula Bula letter cards • Flashcards • Sentence strips • Phonics chart • DBE Rainbow Workbooks (Grade 1) • Board
FW TG	• Learner Activity Books (LABs) • LABs' letter cards • Board • Phonic songs by a WhatsApp bot • Dice from Bala Wandé (phonics games)

One distinguishing, and important difference in the strong framing of resources, is how they are stipulated in the lesson plans. PILO and the FW LPs mark out and explicate the resources needed for the lesson outside of and separate to activity descriptions. The FW LPs, further thumbnail pictures of the various LTSM to support their use. Both also have prompts stipulating preparation such as:

- Before the activity, prepare your flashcards (PILO Term 1, Week 5)
- Before the activity, prepare your flashcards, photocopy the list of Spelling words to give to each learner, and write these words on the board under the heading **Spelling words with ch** (PILO, Term 3, Week 7)
- Make sure every learner has a DBE workbook (Funda Wandé LPs, Term 1, Week 7)
- Stick the letter cards for /s/ and /z/ on the board. Put up flash cards of the phonics words taught this week (FW LP, Term 2, Week 6).

The image belows shows an extract from the Funda Wandé LP showing the demarcations of 'resources', 'preparation', thumbnails of resources as well as 'activities', all of which stipulate the intervention-provided resources for use in the lesson.

Image 4.4.2.2 showing the various ways that resources were stipulated in the Funda Wande Lesson Plans (Term 2, Week 4).



Phonics (15 min)

- **Resources:** Vula Bula letter card for /q/; flash cards of words with the /q/ sound; DBE isiXhosa workbook, pages 106 & 107
- **Preparation:** Make sure that every learner has a workbook.
- **Lesson objective(s):** Practise using the letter /q/ in words and sentences.

ACTIVITIES

1. Recap

- Refer to the flash cards and check the learners' understanding of the words they learned yesterday.
- Learners must break up the word into its syllables and sounds and say it again fluently.
- They must use the words correctly in sentences to show their understanding.

The NECT lesson plans and the FW TG, in contrast, make reference to LTSM for use in activity descriptions as these were incorporated into activity prompts, such as, “say each word loudly and clearly as you show the flashcard: that, then, this, them “(NECT, Term 4, Week 2) or “learners write words in LAB page 155” (FW TG, Term 3, Week 6). The TG goes a step further than the NECT in inserting thumbnails of the LAB to further support its explication and use.

These are important distinctions to draw between programmes as they may result in lesson steps being omitted where resources are not demarcated and referred to before the lesson or before the enactment of the activity descriptions.

Generally, however, across three dimensions of the external framing of selection, all lesson plans showed strong control over the selection of letter-sound, its various representations and the materials for intended use in each lesson.

4.4.3 The control of inter- and intra-lesson as well as intra-activity sequencing

Across all four programmes, the lesson plans showed strong control over the sequence, or the order, of activities in their phonics programmes (inter-lesson). Only where the NECT makes allowance for other alternate phonics programmes to be followed do we see $F^{(e)-}$. An investigation into the order that the letter-sounds are introduced within each of the programmes is not the concern here as these programmes attempt to structure phonics teaching across different languages, with different orthographies and morphologies. The concern here is how the order between lessons and within lessons is structured and controlled.

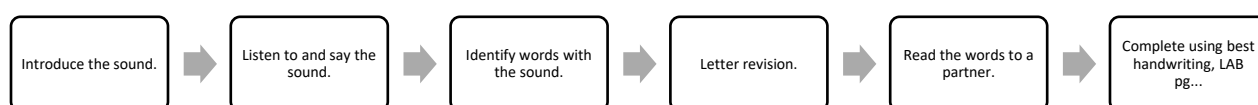
We know by the phonic cycles that there is an overarching structure to the phonics activities that are shared by all four programmes: that of introduction which usually takes the form of expository, or whole class oral teaching, followed by revision or practice usually involving written activities of some kind and lastly testing or consolidation which usually involves written activities under test-like conditions. This overarching structure of phonic cycles, although similar across programmes, differs in the order of lessons, or the order of a learner's induction into a letter-sound. The general order of lessons, or the inter-lesson sequencing of activities, across each programme - strongly framed in every case ($F^{(e)++}$) - is shown below.

Stages of a phonic cycle	PILO	NECT	FW LP	FW TG (Term 3)
Introduction/ Exposition	Introducing the new sound.	Introduce new sounds and words.	Identify and sound the letter.	Introduce the sound
Practice/ Revision	Revises the sound.	Segmenting and Blending; Word Find.	Practice writing and using the letter in words and sentences.	Shared word building; Rhyming words; Independent word building.
Consolidation/ Testing	Testing phonic knowledge.	Handwriting consolidation.	Identify and sound the letter. Read the words taught this week.	Dictation/Phonics game.

The strong framing of inter-lesson sequencing was an expected finding as the lesson plans further exteriorize the curriculum into daily tasks across weeks and terms of the year (Shalem, 2017). Further, the purposeful and systematic 'review' cycles, of the kind seen above is a marker of systematic phonics programmes according to the ILA (2019). However, the ILA's report would perhaps critique all the programmes stating that their review cycles are inadequate. "When a new skill is introduced, it should be systematically and purposefully reviewed for the next 4-6 weeks [as] the goal must be to teach to mastery and not just exposure" (ILA, 2019, p. 6). Only one review or phonics cycle per letter-sound is evident across the programmes except until the last week at the end of a term where the week's phonics is dedicated toward revision of all letter-sounds covered in that particular term. Although it could be argued that that review of the letter-sounds occurs in every lesson incidentally, it remains implicit throughout the programmes.

What is of more interest, however, is in the analysis of intra-lesson sequencing, or the control of the order of activities within the lessons of the phonic cycles. See diagram below for the weakest control of intra-lesson sequencing.

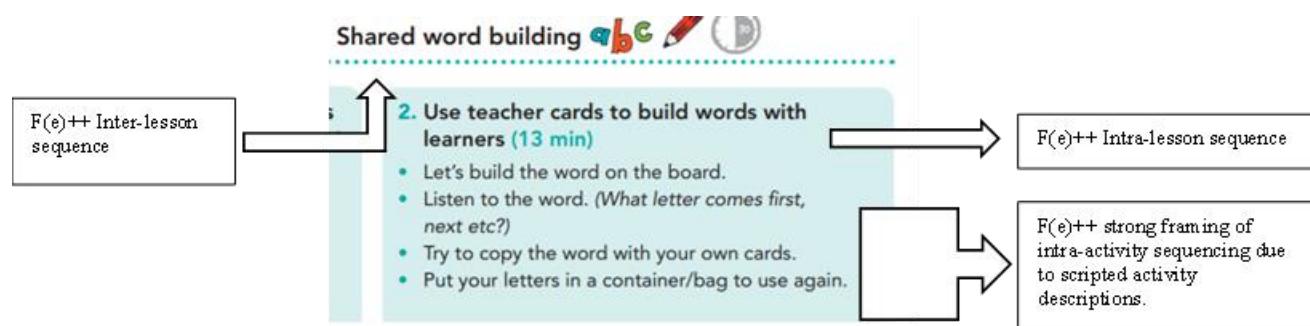
Diagram 4.4.3.1 showing the intra-lesson sequence of FW TGs first lesson of the phonics cycle, 'Introduce the sound' in Term 3, showing 6 lesson steps.



Although, the framing of intra-lesson sequencing is generally strong in that the lesson plans determine how lessons begin, progress and end, it is in how the order of intra-lesson sequencing is controlled within the script or activity descriptions that is of interest here. The indicator that was developed, coding the framing of sequencing *intra-activity*, aimed to capture the degree of scripting using the idea of structure versus scripting. “[Lesson plans] can range from fully scripted (i.e. where the teacher is meant to read directly from the guide to students) to highly structured (i.e. the guide includes general guidance of activities within a lesson but does not script instruction word for word)” (World Bank Group, 2021, p. 6; Piper, et al, 2018). Fully scripted activity descriptions coded $F^{(e)++}$, to general structure, coding $F^{(e)-}$.

Using the World Bank’s diagnostic tool’s definition of scripting as those activity descriptions which the teacher is to read directly to students, saw only one programme doing so in most cases, and coding $F^{(e)++}$ - the Funda Wande Teacher Guide. Previously, under the presentation of the analysis of the framing of the hierarchical rules, the nature of the activity descriptions, i.e. scripting in direct speech, was briefly alluded to. What became apparent was that some scripts attempted to script the teacher’s voice, as in the FW TG Term 1 and 2, and although this made it difficult to discern the intended hierarchical rules and classification of pedagogic identities, it shows a strong control over intra-activity sequencing. As such prompts took the form of direct speech instructions, requiring no interpretation of activity descriptions, only that the teacher is to read directly from the guide ensuring the intended sequence, thus coding $F^{(e)++}$. Consider the diagram illustrating inter-lesson, intra-lesson and intra-activity sequencing below.

Image 4.4.3.2 showing inter-lesson, intra-lesson and intra-activity sequencing in the first term of the Funda Wande Teacher Guide.



Scripts across the other three programmes (PILO, NECT and the FW LPs) attempted to, generally, control not only the teachers voice through indirect speech most of the time, but also his/her actions in delivering the prompts, in preparing for lessons and even in control over the behavioural dimensions of pedagogical acts, as in PILO's lesson plans which instruct teachers to "settle the class" in every instance of activity description.

The PILO programme is an interesting case, however, because it shows variable framing. In 24% of lessons that were sampled, there were elements of full scripting in activity descriptions, where teacher's voices were scripted in direct speech, showing $F^{(e)++}$. For example, in introducing the concept of syllabification, PILO offers the prompt: "say: words can be broken into different parts, called syllables. We can clap the different parts to show how we break words into syllables i.e. parts. I will show you". In almost every case where a new concept is introduced, the definitions and meanings are scripted verbatim, introduced by the prompt "say". Verbatim scripting is also seen in teacher's definitions of sounds, plurals and sentences throughout the guide: but only in initial introductory lessons. This links to the strong framing over evaluative criteria that is discussed later because it makes explicit the rules or meanings that teachers are to transmit.

The other three programmes coded as $F^{(e)+}$ as they provided teachers with highly detailed activity descriptions, but the nature of their indirect speech prompts required interpretation by teachers generally. Below is an example of an activity description from the NECT programme that shows mostly indirect speech prompts guiding teacher's voice and activity.

Image 4.4.3.3. showing indirect speech prompts in the NECT programme.

INTRODUCE SOUND

- 1 Say the sound and hold up the flashcard: /m/
- 2 Say the sound and instruct learners to repeat the sound x 3.
- 3 Discuss how the sound /m/ is the same in home language and English.
- 4 For single sounds, show learners the sound on the alphabet frieze.
- 5 Ask learners: Can you think of words that begin with /m/?
- 6 Brainstorm words with learners, like: **mother, mom, man, mouth**
- 7 Ask learners: Can you think of words that end with /m/?
- 8 Brainstorm words with learners, like: **ham, sum, thumb (the b is silent)**

In only 1 of the 8 prompts guiding the introduction of sound is the teacher's voice scripted in "Ask learners: Can you think of words that begin with /m/?". In the 7 other listed activity descriptions, teachers are to read the prompts inwardly to themselves, interpret, elaborate and deliver the prompts. For example, rather than provide a script of discussion cues, or question openings to aid teachers in enacting number "8. Brainstorm words with learners", teachers are to interpret what this in fact means, think and ask questions that open up a brainstorming dialogue with learners and elaborate and incorporate a discussion on 'the silent b'. Firstly, Piper et al (2018) investigate potential implications of design choices that require a degree of interpretation by teachers on programme fidelity and implementation and generally observe omissions of lesson steps of this kind. More than this, however, prompts such as these hold assumptions about teachers as having high levels of pedagogical and content knowledge across languages. Nowhere in the activity descriptions is there the instruction for the teacher to compare the sound /m/ across the words 'ham, sum and thumb' and draw attention to their different spelling patterns other than the parenthesis '(the b is silent)'. Shalem (2017, p. 189) in their analysis of the GPLMS lesson plans, observes and investigates the enactment of the activity descriptions for the lesson on the *silent k*. Shalem explains that,

The silent k is an unusual and exceptional letter/phonics formation. By avoiding the saying of the 'k' sound in words such as 'knew', 'knee', knife', a reader is engaging in phonemic awareness. The rule concerning the silent k is that it is always followed by n. This is the pattern in which the silent k is embedded. The lesson plan does not make explicit this subject matter knowledge point nor suggest the unique case of the silent k.

Similarly, the case of the silent b in thumb is embedded in the spelling pattern that 'm' always precedes it. This is the rule that may remain unelaborated as it is uncontrolled by the lesson plan. Increasing learners' word awareness, in this way by elaborating unique and often unpredictable

spelling patterns, is another marker of an effective phonics programme (ILA, 2019), particularly in languages with opaque orthographies.

I offer now a comparison to diagram 4.4.3.2 above. The figure above showed strong framing of intra-activity sequencing through the direct speech prompts it offered teachers in its activity descriptions. Figure 4.4.3.3 below, however, shows weak framing over intra-activity ($F(e)^{-}$) sequencing in the same FW TG but in the third term. The lesson plan below provides a very loose structure of lesson activity in all cases by not offering activity descriptions at all. See below.

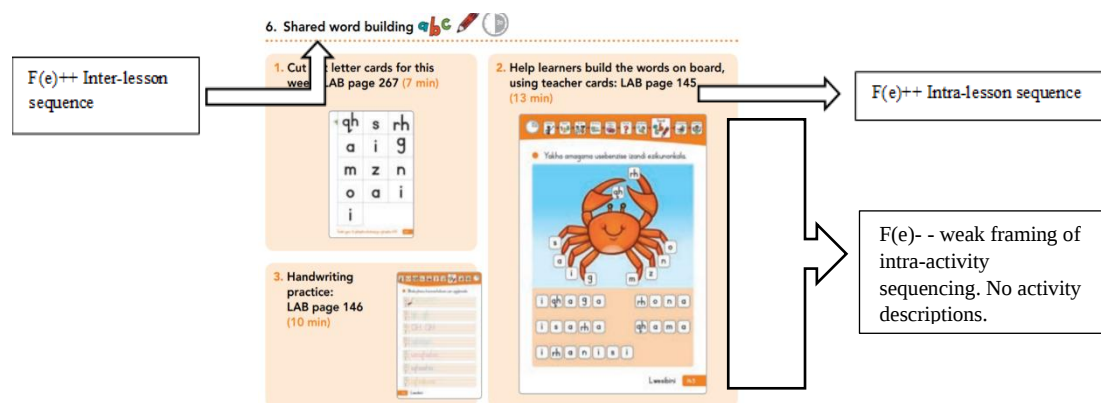


Image 4.4.3.4 showing the loosely structured teacher guide in the third term of the Funda Wande Teacher Guide.

Despite Piper et al's (2018) conclusion that lesson plans that appeared most effective in increasing student outcomes were those that showed a decrease in the level of scripting – as is the case in FW TG illustrated above - a decrease in scripting offers teachers less guidance in completing lesson routines. The assumptions that underlie this design choice is that of teacher fidelity, that scripting is no longer necessary by Term 3 because teachers will be knowledgeable of and practiced enough in enacting the routines stipulated by the lesson plans. In an evaluation of the Funda Wande intervention across the Western Cape, Eastern Cape and Limpopo provinces (Hoadley, Boyd, Sandan and Njara, 2022), fidelity was widely variable and as such by Term 3, teachers have less support offered by the TG as their comfortability with the programme is assumed.

This variable framing in the tapering off of scripting, and the assumptions that underlie it, is seen in PILO as well where definitions and meanings are initially scripted in activity descriptions and then are unscripted in later phonic cycles. The NECT and FW Lesson Plans do not make such an

assumption, however. The scripting in NECT and the FW LPs is consistently detailed and strongly framed ($F^{(e)+}$) across the lesson plans.

Before concluding the analysis on the control of the pedagogical dimensions, the external framing of evaluative criteria is considered.

4.4.4. The control of evaluative criteria

Attention is turned now, lastly, to the presentation of the findings of the analysis of the external framing of evaluative criteria. As described in Chapter 3, two indicators were developed to measure the extent of control the lesson plans hold over the relay of evaluative criteria.

Procedural controls over evaluative criteria refer to the extent of the explicitness of the prompt to relay evaluative criteria. The scripting of the procedure for relaying the evaluative criteria, however, may not always match the availability of the evaluative criteria – the concepts, definitions or meanings – that are to be relayed. These are the conceptual controls over the framing of evaluative criteria, and this refers to the presence, or absence, of the evaluative criteria that are required for transmission. A discussion on procedural controls follows.

Consistent with the finding of the tapering-off of intra-activity sequencing, the Funda Wande Teacher Guide shows the same tapering-off of procedural controls over the framing of evaluative criteria from Term 1 through Term 3. Table 4.4.4.1 below shows the changes seen in the procedural controls across the three terms, with examples of procedural prompts to illustrate.

Table 4.4.4.1 showing the changes seen in the procedural controls across the three terms, with examples of procedural prompts to illustrate.

FW TG Term 1	FW TG Term 2	FW TG Term 3
$F^{(e)++}$	$F^{(e)++}$	$F^{(e)-}$
• What is this picture? (os) • Listen to the first sound, ooo. • Say the sound. • Notice what your tongue and mouth do.	• What is this picture? • Listen to the first sound, jjjj. • Say the sound. • Notice what your tongue and mouth do.	• Notice your mouth.

In each case above, the teacher is prompted to relay the sounds that are denoted by the various letters, getting learners to repeat these while noticing where and how the sound is formed by the

mouth. The first two terms show instances of strong framing over the procedure of relaying evaluative criteria.

These two iterations of the same activity are seen in introduction lessons to particular letter-sounds, under the “listen to and say the sound” part of the lesson. Across Terms 1 and 2, the expanded activity descriptions remain stable, although by the third term, the four prompts are seen to collapse into one, and teachers are prompted to deliver all four prompts marked only by the instruction to tell learners to ‘notice your mouth’. The activity descriptions controlling the relay of evaluative criteria are here implied, thus scoring $F^{(e)-}$. It is assumed that teachers, by term 3, have achieved a familiarity with the programme and have internalised the introductory routines. The procedure to relay the evaluative criteria is no longer controlled by the lesson plans, and their relay rests on the knowledge, pedagogical expertise, or learnt routine, of the teacher.

Consistent, too, with the findings on the intra-activity sequencing before, PILO, NECT and the Funda Wande Lesson Plans showed stable and consistent control over the framing of the procedural controls controlling the relay of the evaluative criteria. Control was not yielded or tapered-off as in the FW TG. However, within the lessons across phonic cycles, the scripting of procedure for relaying evaluative criteria were inconsistent within the NECT and FW LP programmes, in terms of their explicitness. Consider the prompts from each programme below and notice the inconsistency across $F^{(e)}$ scores.

Table 4.4.4.2 showing the explicitness of various prompts controlling intra-intra activity sequencing.

Funda Wande Lesson Plans	
Check the learner's understanding of the words taught yesterday	$F^{(e)-}$
Refer to the letter card and words to remind the learners of what they learned yesterday.	$F^{(e)+}$
Guide the learners to do the activities on pages 102 and 103	$F^{(e)-}$
Read the instructions to the learners. Give them time to complete the task on page 94 and 95.	$F^{(e)+}$
Ask the class for feedback	$F^{(e)- -}$
Stick the letter card on the board and ask: What is this? [Then] repeat the response – ikati – and emphasise the /k/ sound.	$F^{(e)+ +}$
NECT	
3 Segment the word into the individual sounds: /t/-/ur/-/n/	$F^{(e)+ +}$
4 Say the beginning sound of the word: /t/	

5 Say the middle sound of the word: /ur/	
6 Say the end sound of the word: /n/	
7 Write the word on the chalkboard: turn	
Brainstorm words with learners, like: quiet, quick, quietly	F ^(e) +
Say the sound and hold up the flashcard: /qu/	F ^(e) +
Discuss how the sound /c/ is different in Home Language and English.	F ^(e) -

Contrast the first two FW LP prompts. “Check the learners’ understanding of the words taught yesterday” forms part of a revision lesson in the phonic cycle where teachers are to evaluate learner’s ability to identify and use the sounds taught in the previous lesson. It requires the teacher to read the prompt during the pedagogical instance, interpret and recontextualise the instruction by creating questions or tasks that will sufficiently evaluate learners’ understanding. Due to the interpretation required on the part of the teacher, F^(e) - was scored, as little/no explicit guidance on how the teacher ought to check learners’ understanding is provided. However, in the prompt below this one where the teacher is to “refer to the letter card and words to remind the learners of what they learned yesterday”, less interpretation is required in enacting the prompt. The teacher is instructed to show various letter cards of some words and the target sounds to enable learners to recall, in order to evaluate learners’ understanding before she/he proceeds with the revision lesson in this particular phonic cycle. This latter example shows stronger framing over the procedure for relaying evaluative criteria, and there are fewer implications for and interpretations made of the teacher.

Some of the NECT activity descriptions use slightly unclear prompts to describe teacher activity, showing slightly weaker framing over the procedure for relaying evaluative criteria. This was alluded to in the framing of hierarchical rules as well where teachers are to “brainstorm with” and “discuss” similarities in sounds across languages, for example. Teachers are required to read the prompt such as “brainstorm words with learners, like:...”, know what it means to ‘brainstorm’ which generally follows a more open enquiry as well as informal relations between teacher and taught, determine questions, encourage learners to speak and participate, as well as ensure that the necessary evaluative criteria are relayed. These are expert pedagogical processes.

Moving on from the table above, and although the NECT programme shows instances of weak framing over procedural controls for the relay of evaluative criteria, some lessons are explicit in the pedagogical practices that teachers are to use. The NECT programme in activity descriptions divides activities according to the gradual release model, for example, where teachers are instructed to “I do”, then “we do” or as in other activity descriptions teachers are to “model” and then “learners do”. Admittedly, these are not instances of strong framing of procedural controls over evaluative criteria but they serve as markers of attempts to explicate the pedagogical practices and strategies for enactment. See thumbnails of these markers below.

Image 4.4.4.1. showing how the NECT programme makes pedagogical strategies explicit.

Phonemic Awareness and Phonics:
15 minutes

Segmenting and Blending

I DO...

- 1 Start with a word from the Tuesday lesson.
- 2 Say the word: **lick**
- 3 Segment the word into the individual sounds: /l/ – /i/ – /ck/
- 4 Say the beginning sound of the word: /l/
- 5 Say the middle sound of the word: /i/
- 6 Say the end sound of the word: /ck/
- 7 Write the word on the chalkboard: **lick**
- 8 Model pointing and blending the sounds to make a word: /l/ – /i/ – /ck/ = **lick**
- 9 Repeat this with a word from the Wednesday lesson: **call**

WE DO...

- 1 Start with a word from the Tuesday lesson.
- 2 Say the word: **leg**

Gradual release model

WEEK 4

MODEL

- 1 Remind learners of the sounds of the week: /l/ and /ll/
- 2 Review all of the sounds and blends on the chalkboard.
- 3 Give learners 3 minutes to make as many words as they can using the sounds and blends above.
- 4 Show learners how to make a word using a target sound, like: /b/ – /a/ – /ll/ = **ball**
- 5 Remind learners they can make a word using any of the sounds – they do not need to use /l/ or /ll/
- 6 Show learners how to make another word, like: /h/ – /u/ – /t/ = **hut**

LEARNERS DO

- 1 Tell learners to open their exercise books and write the heading: **I, ll**
- 2 Instruct learners to begin writing.

This explication of the pedagogical strategy of gradual release encourages the correct and effective use of the gradual release model – a characteristic of effective phonics instruction. This may prevent teachers from having learners simply parroting and repeating words and activities back to the teacher – a common communalised activity in typical South African classrooms (Hoadley, 2018). It guides the teacher in releasing his/her control and having the learners do the necessary work (ILA, 2019, p. 7).

PILO scored F^(e)++ in 83% of the lessons that were sampled and coded. The remaining 13% of (5 out of 29) lessons that were coded showed slightly less-strong framing of procedural controls over the evaluative criteria and scored F^(e)+. Throughout the programme prompts such as ‘make the sound clear’, ‘repeat the answer emphasizing the sound’, ‘use objects/pictures where the word contains the sound’, ‘repeat sounds’, ‘show how sounds combine to produce a new sound’, ‘[learners] might not be able to so draw an example, so you should do an example on the board with the learners the first few times that they have to do this’ and ‘follow the same procedure for the rest of the words’ all show strong framing over the procedure of relaying evaluative criteria. Teachers are clearly and explicitly instructed to make the evaluative criteria known to the learners, and no assumptions of teacher’s expertise or know-how is evident.

Consider the following contrast between the last and consolidatory part of phonic cycles across the PILO, NECT and FW TG programmes. The following lessons show informal testing (NECT) or assessment lessons (PILO and FW TG). Take note of the procedural control over the relay of evaluative criteria in the prompts telling teachers to offer feedback.

Table 4.4.4.3 contrasting the testing parts of phonic cycles across the PILO, NECT and FW TG.

PILO	NECT	FW Teacher Guide
Term 4, Week 6	Term 1, Week 4	Term 3, Week 8
•Tell the learners that you are going to revise each word. If a learner has the word wrong they must write the correct word next to the incorrect word. •Say the first word and sound it out, and then write it on the board next to 1. Then point to each letter and say the sounds.	3. Next, tell learners to take a coloured pencil and correct their own work. 4. Clearly write the sounds and words on the chalkboard. 5. Collect learners’ books at the end of the day, and make a note of who needs additional help.	4. Phonics Assessment 2  Dictation: LAB page 210 • I will say a word slowly. • I will repeat it once. • Write the word in your best handwriting. • Work on your own. Marking: See page 240 (10 marks)

Any learner who has the word wrong writes it next to the word. •Follow the same procedure with all the words (1 – 8). •For numbers 9 and 10 write the words on the board; first orally break the words into syllables and then write the words again using lines to indicate the syllables. •Any learner who has written the syllables incorrectly must write the correct syllables.		
F^{(e)++}	F^{(e)+}	F^{(e)+}

The relay of evaluative criteria during sessions of feedback after a typical spelling test are much more controlled in the PILO programme than the NECT and the FW TG. Where the NECT lesson tells the teacher to “clearly write the sounds and words on the chalkboard”, the PILO programme instructs teachers to “say the first word and sound it out, and then write it on the board next to 1. Then point to each letter and say the sounds. Any learner who has the word wrong writes it next to the word”. The procedure is more elaborated, and the relay of sounds, letters and words are clearer and more explicit. This is an instance of strong control by the lesson plans in aiding teachers in enacting an instance of guided dictation – a characteristic of effective phonics instruction (ILA, 2019). Undoubtedly this requires more reading on the part of the teacher and requires him or her to incorporate more into their routine during the enactment, but the PILO scripts make no assumptions of teacher’s competence and are written to ensure the relay of evaluative criteria to learners who are learning letter-sound correspondences in order that they may decode text.

A feature seen across both the NECT and PILO programmes, following testing lessons (although not seen in the PILO example above) is a prompt directing teachers to “make a note of learners who need additional support” (NECT: Term 2, Week 4) or “note those learners who got more than half of the words incorrect so that you can give extra support” (PILO: Term 3, Week 4). This encourages conscious evaluation of learner performances on the part of the teacher and encourages teachers to offer additional support to struggling learners. This ‘support’, however, is not

controlled by the lesson plans and is yielded to the teacher. The teacher is in control of the “support” activities as these are not scripted by, nor is time allocated to these in the lesson plans. No guidance is offered as to what support or activities may be beneficial or appropriate, or when teachers are to devote the time to offer appropriate support. Shalem (2017) in her review of the GPLMS lesson plans makes the same assertion and argues that lesson plans may have to be expanded to support this function.

It is of concern here, that the teacher is not prompted to evaluate or mark out learner performances in the same way in the FW TG lesson shown in the table above. There are no prompts for the teacher to help learners assess their own work, or offer up corrections formatively, in the way that NECT and PILO do. The procedural controls seen in the phonics assessment in the FW TG is in guiding teachers to enact the procedure of ‘testing’ and is not concerned with the *relay* of evaluative criteria, thus scoring F^(e)- - as this is left up to the discretion of the teacher.

I turn now to the conceptual controls over the evaluative criteria or the availability of the evaluative criteria in the lesson plans. In other words, were the principles, meanings and criteria for tasks made available for transmission in the lesson plans? Table 4.4.4.4 below lists the types of conceptual controls that were seen across all programmes, as well as a percentage count of how regularly these conceptual controls were seen in the lessons sampled.

Table 4.4.4.4 Conceptual controls seen in the lesson plans as well as how often they were evident in the sample analysed.

Conceptual controls over evaluative criteria	PILO	NECT	FW LP	FW TG
<u>Explications of sounds/concepts</u>				
A description of the letter-sounds being taught is provided with relevant vocabulary, e.g. hard /th/ sound or “explain that this sound is written using two letters”.	-	6%	-	22%
Descriptions of how the sound is formed by the mouth, following prompts for learners to ‘notice their mouth’ while saying the sounds.	-	-	0%	0%
Definitions of relevant meanings and concepts were made available in the lesson plans.	10%	-	-	4%
Correct answers to prompted questions are provided by the lesson plans.	F(e)++	F(e)+	F(e)+	F(e)- -
<u>Explicated lesson outcomes</u>				

Relevant knowledge and skills that are to be relayed are evident in the lesson plans.	100%	-	-	-
Lesson Objectives	-	-	100%	-
Lesson Focus	100%	-	-	-
Criteria for the marking of learner productions (rubric)	-	-	-	6%
External framing of the conceptual control over evaluative criteria (F^{(e)++/- -})	F^{(e)++}	F^{(e)+/-}	F^{(e)+}	F^{(e)-/-}

In 22% of FW TG sampled lessons, explications of sounds were made available. This was achieved through the use of multimedia phonics songs downloadable off of WhatsApp. Sometimes, teachers were prompted to explain that this sound is written using two letters, elaborating on digraph spelling patterns. In instances where learners had to repeat a sound and “notice” what their mouths were doing, no evaluative criteria were offered to teachers on how to describe where in the mouth the sound originates, or how it is formed, or where the air is being pushed out from, whether the lips touch or the mouth opens or closes during the formation of the sound. The FW TG did provide definitions and meanings of concepts in only 4% of the sampled lessons, and these were found in lessons teaching plurals and ‘yes/no’ questions.

The NECT programme was largely inconsistent in explicating various sounds or spelling patterns for teachers. In words with the /m/ sounds it was noted that in thumb, the “‘b’ is silent”, or that the spelling for the sound /l/, when it occurs at the end of a word is written ‘ll’, as in ball. This was inconsistent in that, for example, split digraphs like a-e, in ‘cake’ remained unelaborated and no conceptual controls over the explanations or descriptions of this spelling pattern were evident.

The PILO programme was unique in that it listed in every case, prior to activity descriptions, a list of content, concepts and skills. These outlined the knowledge that learners were to know and proficiencies they should have at the end of each lesson. As such, there was strong external framing of evaluative criteria in every instance. Consider the explication of content, concepts and skills towards the end of Term 1 below.

CONTENT CONCEPTS SKILLS	• Identifies letter sound relationships of single letters • Learns vowels and consonants • Learns to combine the consonant with the vowel to produce a new sound • Recognizes the sound learnt in a word • Builds words with the sounds learnt • Examples contain the sounds already taught • Reads the words using the sounds taught • Divides words into syllables • Learns to spell at least 5 words per week
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Image 4.4.4.2 showing PILO's explication of content, concepts and skills.

This list of content, concepts and skills were further strengthened by a lesson focus that preceded each lesson's activity description. Lesson foci included statements as "learn to recognise and read the b sound". This was similar to that seen in 100% of the FW LPs, listed as 'lesson objectives' where objectives for the lesson were succinctly and clearly stating the lesson's goals. For example, see below.

Image 4.4.4.3 showing FW LPs clearly stated lesson objective.

■ **Lesson objective(s):** Identify and sound the letter /q/ from words.

It was not possible to calculate the percentage of instances where the lesson plans scripted correct answers to prompted questions as these were seen inconsistently across lessons and across phonic cycles. In PILO generally, as well as in the Funda Wande Lesson Plans, in revision lessons in NECT, and in a few instances in the introduction lessons to sounds in the FW TG, the answers to scripted questions were made available to teachers. All of these, however, were generally unelaborated. PILO generally scored $F^{(e)++}$ in scripting answers. This is corroborated by the tight and detailed script and the strong external framing of procedural controls and sequencing discussed previously.

The FW TG held generally very weak framing of the conceptual controls over evaluative criteria, due to their very limited, sometimes absent, activity descriptions. Only in a typical revision lesson in phonic cycles across the NECT programme were words annotated showing the teacher the correct segmenting of syllables and blending of sounds ($F^{(e)+}$). This was seen in the PILO and FW LPs as well. Activities of blending and segmenting is a characteristic of a highly effective phonics programme. In fact, these are "the main strategies for teaching students how to sound out words and must be frequently modelled and applied" (ILA, 2019, p. 4).

Generally, however, the conceptual controls were difficult to determine, as their presence in lesson plans were minimal, fleeting and generally unelaborated. Admittedly, the conceptual level of phonics is low but in Shalem's (2017) analysis and critique of the GPLMS lesson plans and how they structured – or didn't structure – phonics teaching, it was argued that appropriate execution of the lesson plans depended upon teacher's knowledge of evaluative criteria which would require "a far more expanded version of the scripted lesson plans" (pp. 186).

The final part of this chapter summarises the pedagogical dimensions analysed above and brings them into a relationship with the level of scripting seen in each of the programmes.

4.5 Scripting and its relationship to controls

The coding scores across all 14 pedagogical dimensions were collapsed into a general score before considering their relation to the level of scripting within each programme. Term 3 in the Funda Wande Teacher Guide is separated out from the general programme as the differences between Terms 1 and 2, and Term 3 were striking. Consider the general scores as captured in the table below, before considering the level of scripting in each programme.

Table 4.5.1 summarising the coding scores of all pedagogical dimensions across all programmes.

<u>Pedagogical Dimensions</u>	<u>PILO</u>	<u>NECT</u>	<u>FW LP</u>	<u>FW TG</u>	<u>FW TG</u> (Term 3)
Classification of Discourses					
Inter-disciplinary relations	C ⁺⁺	C ⁺⁺	C ⁺⁺	C ^{++/-}	C ⁺⁺
Intra-disciplinary relations	C ⁺⁺	C ⁺	C ⁺⁺	C ⁺	C ⁺
Intra-intra disciplinary relations	C ⁻⁻	C ⁺⁺	C ⁻⁻	C ⁻⁻	C ⁻⁻
Classification of pedagogical subjects					
Interactions	C ⁻⁻	C ⁻⁻	C ⁻	C ⁻⁻	C ⁰
Evaluations	C ^{++/0}	C ^{+/0}	C ^{-/0}	C ⁰	C ⁰
External Framing					
Hierarchical rules	F ^{(e) +}	F ^{(e) -}	F ^{(e) +}	-	-
External framing of discursive rules					

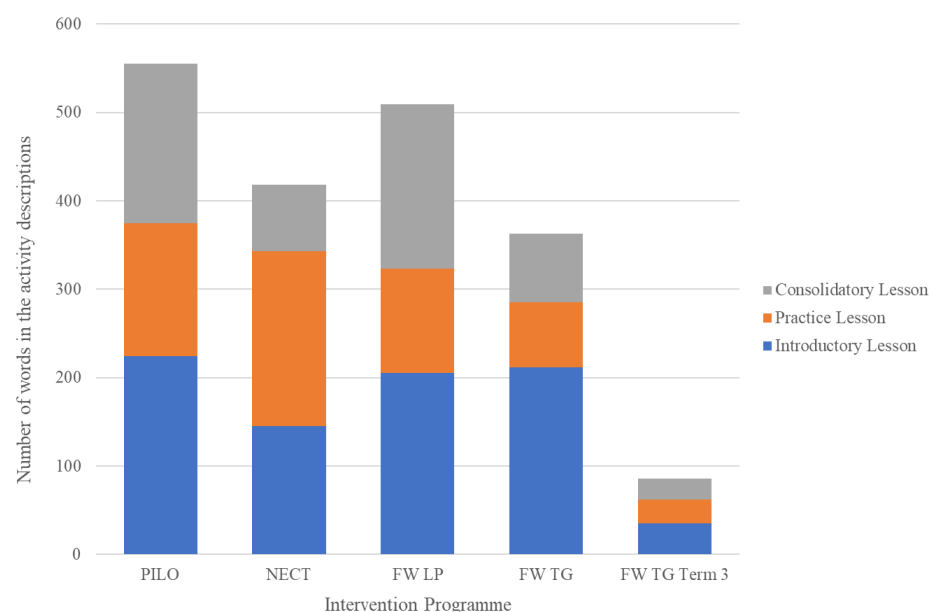
Time/Pace	F ^(e) +	F ^(e) +	F ^(e) +	F ^(e) ++	F ^(e) ++
Selection (inter-lesson)	F ^(e) ++	F ^(e) ++/--	F ^(e) ++	F ^(e) ++	F ^(e) ++
Selection (intra-lesson)	F ^(e) ++	F ^(e) ++	F ^(e) ++	F ^(e) ++	F ^(e) ++
Selection (LTSM)	F ^(e) ++	F ^(e) +	F ^(e) ++	F ^(e) +	F ^(e) +
Sequence (intra-lesson)	F ^(e) ++	F ^(e) ++/--	F ^(e) ++	F ^(e) ++	F ^(e) ++
Sequence (intra-activity)	F ^(e) +/++	F ^(e) +	F ^(e) +	F ^(e) ++	F ^(e) --
Evaluative criteria (procedural)	F ^(e) ++	F ^(e) +	F ^(e) ++	F ^(e) ++	F ^(e) -
Evaluative criteria (conceptual)	F ^(e) ++	F ^(e) +	F ^(e) +	F ^(e) +	F ^(e) --

PILO showed the strongest controls across all 9 pedagogical dimensions concerned with the external framing over the hierarchical and discursive rules of pedagogy. The FW TG showed the strongest controls over time, but generally all lesson plans held strong control over the selection, sequence and pacing of the curriculum. Generally, the pedagogical dimension in which all the lesson plans show the weakest framing is in the conceptual control over evaluative criteria.

The extent of control is now considered against the level of scripting in each case. Considering the level of scripting is important because it is a major area of debate in the design and effectiveness of lesson plans. I draw on Piper et al (2018) whose scripting index was generated from counts of pages-per-lesson and words-per-page. The level of scripting here is considered more simply, using word counts of activity descriptions only.

Graph 4.5.1 below shows the word counts of activity descriptions of introductory, practice and consolidatory lessons across a typical phonics cycle in each programme. The FW TG for Term 3 was separated from the remaining FW TG to contrast the different levels of scripting *within* the FW TG.

Graph 4.5.1 shows word counts of typical phonic cycles across all four programmes, and FW TG Term 3.



The PILO and FW LP programmes show the highest word counts, and generally have the most detailed activity descriptions that cover many dimensions more than the teacher's voice, or what they teacher is to say verbatim from the lesson plans. PILO and FW LPs also show the strongest controls across all pedagogical dimensions listed in the table above, showing a relationship between greater control and more scripting.

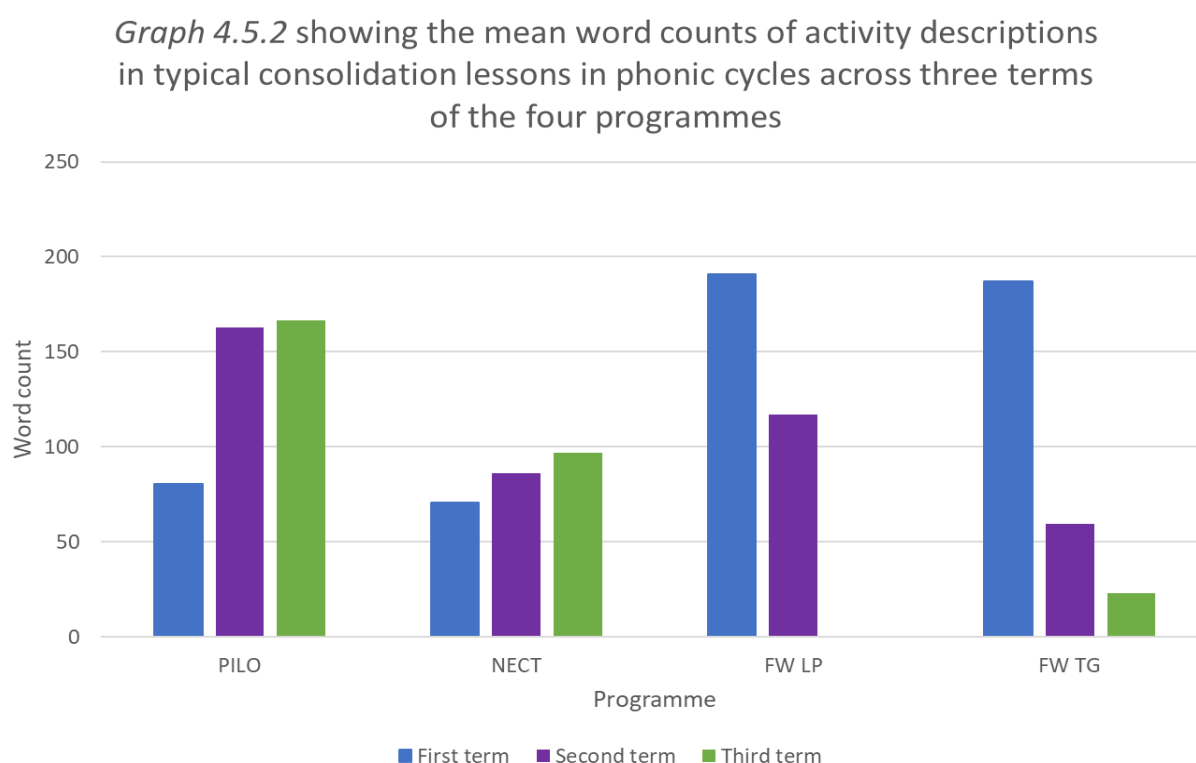
The FW TG shows the lowest word count by a 40-50 word margin. The FW TG's introductory lesson on the graph shows one of the highest word counts but it is important to note that this word count shows that of an integrated phonics and handwriting lesson. In real terms, the activity descriptions guiding the introduction to *phonics* in the Funda Wande TG is less by half. Because the FW TG only scripted what the teacher was to say in most cases, activity descriptions were generally shorter and of fewer words. As has been discussed previously, because of the nature of the prompts scripting only the teacher's voice, the teacher's actions and behaviours were uncontrolled. As such, the FW TG showed the fewest, and weakest controls of all the programmes.

The third term of the FW TG shows the very low word counts across phonic cycles by the third term of the FW TG. Across introductory, revision and consolidatory lessons, less than 100 words are used to guide teachers in their activity. This correlates to the absence of controls seen across

the classification of pedagogical subjects by interaction and evaluation, hierarchical rules, intra-activity sequencing as well as procedural and conceptual controls over the evaluative criteria, as shown in table 4.5.1.

PILO is a heavily scripted programme. The word counts shown in the graph above only count words in activity descriptions and does not include the extraneous detail such as the list of concept/content/skills and resources that are seen across every lesson in PILO. In real terms, the word count is more than is shown in graph 4.5.2. PILO, also, shows the strongest controls across all pedagogical dimensions except time (which is still strongly controlled). Considering the above, a clear relationship is evident between scripting and controls.

The graph, *Graph 4.5.2*, that follows shows the word counts of activity descriptions in consolidatory or testing lessons of the phonics cycles that were sampled across each term of each programme. The mean word counts in each term are presented here and compared.



Attention is drawn to the decrease in scripting in the Funda Wande Teacher Guide from Terms 1 to 3. Piper et al (2018, p. 2) found that “teacher guides that provided fully scripted lesson plans at the beginning of the guide and shifted to structured lesson plans tended to improve learning

outcomes”. This is worthy of further investigation. The FW TG is the only programme to show a significant decrease in the level of scripting by more than 150 words.

The Funda Wande LPs also show a decrease in scripting across the two terms analysed by an average of 70 words. 70 words, it must be remembered, may not sound significant but these are instructions and descriptions that teachers are to read as they teach.

The NECT and PILO lesson plans show the opposite trend in the scripting of activity descriptions. The word counts in activity descriptions are seen to increase with the progression of phonics across the year. The NECT shows a consistent increase across terms due to the increase in the amount of spelling words and representations learners are to engage with as the year progresses.

PILO’s consolidation lessons show consistently high levels of scripting across Terms 2 and 3. Again, this is positively correlated to the presence of controls. The PILO lessons plans showed strongest control (seen through intra-activity sequencing and procedural controls over evaluative criteria) over the activity of guided dictation or in the whole-class correction of informal spelling tests – a feature of a highly effective phonics programme.

In summary, and conclusion, this chapter has presented the main findings in the analysis of the various lesson plans. In analysing the pedagogical dimensions using Bernsteinian tools of classification and framing, the controls were ascertained and then considered in relation to literature on effective phonics instruction and on levels of scripting. The chapter following presents discussion and reflection on these findings.

CHAPTER FIVE

DISCUSSION

This final chapter discusses and reflects on the pertinent findings from the analysis of four cases of lesson plans found in four structured pedagogic programmes in South Africa. This chapter will answer each of the five research questions presented in Chapter Three and Four preceding this.

The research questions, again, are outlined below.

- i) First, what regulations are held over the content of phonics in each case?
- ii) What controls are placed over pedagogy in each case?
- iii) How do these controls correspond to the literature on effective phonics instruction as proposed by the International Literacy Association?
- iv) What is the level of scripting in each case of lesson plans?
- v) And lastly, what is the relationship between the level of scripting and the extent of pedagogical control in each case?

Firstly, a discussion on the ‘controls’ over the content of phonics will be presented and reflected upon before the controls of pedagogy are discussed in much the same way. Following this, the level of scripting and its relationship to the extent of control will be considered.

The aim here is *not* to summarise all the findings as these are discussed in the previous chapter in some detail, but to draw out the findings that illuminate ideas posed in current debate on effective teacher guides and lesson plans and in literature on effective phonics instruction in early grade reading in South Africa. First, consider the controls over content.

5.1. Control over content

5.1.1. A ‘decontextualised’ phonics approach

In a report that evaluated the Funda Wandu Teacher Guide (FW TG) materials for Term 1, Mason and Snow (2021) recommended that “some areas where the curriculum could see improvement include a stronger connection to oral language and life skills”. Furthermore, they suggest an example where “sorting activities could also provide an opportunity to incorporate a phonics

component as well” (p. 21). What they call ‘connection’ and ‘incorporation’, this research calls integration, where explicit attention is drawn to phonics components throughout other language components in the reading programme. The boundaries, as such, between phonics and other Home Language components should be weaker (C⁻) to allow for integration.

Despite increased calls for integration, phonics instruction should still be distinct and allotted its own time for instruction as phonics instruction should be explicit (ILA, 2019; Spaul & Pretorius, 2019). Classification should be strong (C⁺⁺) in initial introductions to new letter-sounds, and opportunities for review and recursion could come out of increased integration with other Home Language components.

Not only does integration ensure increased opportunities for practice and revision of letter-sounds and phonics knowledge outside of phonics lessons, but it also ensures a ‘contextualised’ phonics programme, where explicit focus is drawn to phonics during periods of extended reading, for example, as in during shared or group guided reading. This aligns with the recommendations of the International Literacy Association’s report that describes the ‘reading of connected texts’ as a feature of effective phonics programmes, where explicit attention is drawn to phonics in lessons where children are engaging with texts of different types and with different purposes, under the guidance of a teacher. Learners may begin to contextualise phonics and begin to see it as a tool and a means to comprehend the reading code (ILA, 2019; Moss, 2010).

All four programmes, however, showed strong classification of intra-disciplinary relations (C⁺ and C⁺⁺). The NECT, Funda Wande Lesson Plan (FW LP) and FW TG had aligned phonics and handwriting programmes where handwriting lessons were used as practice, although generally little explicit attention is drawn to the letter-sounds in handwriting and focus is given to correct letter formation only. PILO only showed alignment between phonics and handwriting in Term 1 of its programme and showed the strongest classification, and decontextualisation, along this dimension. The NECT programme, too, gives teacher’s the opportunity to follow alternate phonics programmes in every instance, showing the greatest decontextualisation of phonics, as their phonics programme was inter-changeable with others of the teacher’s choosing.

Interestingly, Molteno’s Vula Bula series, a compilation of stories developed to follow the orthographic and morphological structure and progression of each home language was part of the resource arm of the FW LP and FW TG interventions, and yet no use of this resource was

integrated into phonics lessons or vice versa. This is a missed opportunity for the necessary shift towards a contextualised phonics programme.

5.2. Control over pedagogy

5.2.1. Exteriorisation of curriculum

All the lesson plans showed generally strong framing over the selection, sequence and pacing of phonics throughout the year, although to different degrees. In attempting to structure pedagogy, all lesson plans are seen to prescribe letter-sounds to particular units of time in an intentional sequence of progression.

This research advocates for the strongest controls over selection, sequence, pacing and relay of evaluative criteria ($F^{(e)++}$), adopting the underpinnings of Direct Instructional (DI) curricula created by Engelmann and advocated by Barbash (2012). In maintaining strong controls over all pedagogical dimensions, no assumptions of teachers' expertise are made.

In typical South African classrooms, Taylor (2019) describes low levels of teacher knowledge. He cites Taylor and Vinjevold (1999) commissioned by the President's Education Initiative (PEI) of 1998 which stated that "one of the most consistent findings of a number of PEI projects pointed to teacher's low levels of conceptual knowledge, their poor grasp of their subjects and the range of errors made in the content and concepts presented in their lessons" (Taylor & Vinjevold, 1999, p. 147). Although stated over two decades ago, these findings converge with later small-scale findings that identify features of teacher's low conceptual knowledge (Schollar, 2004; Ensor et al, 2009; Hoadley, 2012 as cited in Taylor, 2019, p. 265).

The conclusions of these small-scale findings were "unambiguously confirmed" by the results of tests testing teachers' rudimentary English literacy skills in the third reiteration of the Southern African Consortium for Monitoring Educational Quality (SACMEQ) in 2007 (Taylor, 2019, p. 266). It was found that 75% of teachers attained the Low International Benchmark in terms of the extent of their disciplinary knowledge – admittedly in tests of English competence. However, in the latest Progress in International Reading Literacy Study (PIRLS), 78% of South African Grade 4 learners could not score at the lowest international benchmark for reading comprehension in their home language – a striking correlation to the teaching scores obtained.

Taylor implies causation, however, where he states that “the PIRLS results indicate that the majority of South African teachers lack the most basic [pedagogical content knowledge] required to teach their learners to decode words – to know which words are denoted by particular configurations of symbols on the page” (Taylor, 2019, p. 270).

Levels of teacher expertise cannot be assumed, but rather supported by lesson plans that follow DI curricula and tight controls over the selection, sequence, pacing and relay of evaluative criteria. Tight scripts that show strong external framing of the relay of evaluative criteria ($F^{(e)++}$) potentially ensure that teachers relay, and that learners receive, the correct ‘rules’, meanings, concepts and evaluative criteria needed for decoding text: a prerequisite of comprehension.

Furthermore, by having teachers follow a tight script of what to teach and how, under strong intra-intra activity time allocations (to the minute), as seen in the FW TG, lesson plans could begin to create a greater shift in the slow pace and slow curriculum coverage that serve as further endemic features of typical South African classrooms (Hoadley, 2012; Hoadley, 2018).

5.2.2. The issue of pacing

Rastle (2022) in her review of the South African early grade reading curriculum argues that the Curriculum and Assessment Policy Statement (CAPS) follows a slow pace of progression of phonics sounds. The rate at which letter-sounds are covered ought to be faster and more rapid. The CAPS curriculum recommends the introduction of two letter-sounds a week in Grade 1. Being aligned to the curriculum, all four programmes introduce two letter-sounds a week. Each letter-sound is covered explicitly in phonics cycles of introduction and lessons of practice and consolidation are, however, shared between the two weekly letter-sounds across all programmes. Towards the end of the term, all letter-sounds covered in that particular term are revised and explicit focus is given towards revision.

The International Literacy Association’s (ILA, 2019) report characterises repetition and review cycles as effective features of phonics programmes. Review and repetition cycles ensure practice and mastery and are to occur frequently. In all four programmes, the review of letter-sounds occurs twice, generally: in the first introduction phonic cycle which includes revision, and then again in the last revision phonics cycle at the end of term. There is, as such, only one explicit cycle for review and revision, and these allocations of time are shared by all the letter-sounds covered in

that particular term. Neglect of phonics recursion, or insufficient *explicit* attention paid to the revision of letter sounds, is a feature of all programmes.

The question then becomes: how does a programme design phonic cycles that ensure sufficient introduction into letter-sounds with regular review and repetition cycles, while maintaining a fast pace of progression? Perhaps the answer lies in the strong classification and highly bounded introduction to letter-sounds in phonics cycles that introduce letter-sounds at a faster pace, followed by increased integration of phonics practice into other Home Language components such as listening and speaking and reading activities so that review occurs in a contextualised way.

5.2.3. A move towards an individualising pedagogy – or not...

The following extract from Muller & Hoadley (2019, p. 111) describes an enduring feature of a ‘traditional’ developing country pedagogy:

... the unit of teaching is largely the class: the pedagogy is undifferentiated and undifferentiating and there is little explicit marking out of individual performances. The most reliable evidence of this is the persistent pattern of low performance outcomes (Glewwe & Muralidharan, 2015; Pritchett and Beatty, 2012). It is this pattern that curriculum reform sought to reverse.

It was in considering this problematic above – that of the little explicit marking out of individual performances and the increased need for an individualising pedagogy in early grade reading (Hoadley & Boyd, forthcoming) – that drove the contribution of the two indicators for the classification of pedagogic subjects through teacher’s interactions and teacher’s evaluations into the classification schema. These were the markers for the extent to which the lesson plans drew up boundaries between pedagogic subjects and prompted an individualising or a communalising pedagogy.

“In a communalising pedagogy, close scrutiny of what individual learners produce is not possible, and consequently, the conditions for the successful production of the relevant pedagogic text are foreclosed” (Muller & Hoadley, 2019, p. 121). Differentiating learner performances provides the teacher with an opportunity to appropriately evaluate learner responses and remediate accordingly. Lesson plans could shift teachers away from employing a communalising pedagogy and increase individualised and differentiated interactions between teachers and learners.

However, phonics teaching is generally considered a teacher-directed, whole class activity. This may be part of the reason for the observations of increased fidelity to the phonics parts of programmes in early grade reading intervention programmes such as these because the expectations placed on teachers in the lesson plans are easily incorporated into ‘traditional’ communalising and whole class pedagogies (Muller & Hoadley, 2019; Hoadley & Boyd, forthcoming). Across all four programmes, teachers were directed to interact with the learners as a whole class or employ a communalising pedagogy when teaching phonics. This research suggests that it is important for interactions to remain largely communalised in phonics teaching but show increased prompts for teachers to interact with individuals or groups of learners, as these have shown to drive learning gains. All lesson plans showed strength in this regard and prompted communalising interactions generally with some prompts encouraging teachers to individualise.

There were many instances throughout the lesson plans, however, where teachers were not prompted to *evaluate* learner performances (coded as C⁰), and this was problematic. The absence of evaluations – which requires teachers to mark out appropriate performances and relay evaluative criteria is an endemic feature of typical South African classrooms. This feature is referred to as zero pedagogy and is the absence of evaluative criteria in pedagogy and is a characteristic of typical communalising pedagogies (Hoadley, 2018).

Furthermore, “for effective literacy acquisition, children need explicit instruction and cannot be expected to independently discover the rules of written language by themselves” (Nazaryan, 2014 as cited in Hoadley & Boyd, forthcoming). Explicit instruction entails that teachers are to formatively evaluate learner responses and provide feedback (Hoadley & Boyd, forthcoming). Prompting teachers to evaluate, and evaluate in ways that are individualising, thus provides another instance for the relay of evaluative criteria, making for explicit instruction and a more effective pedagogy.

Across all four programmes scores of C⁰ were seen in typical introduction and practice lessons in phonic cycles showing no attempts by the lesson plans to differentiate learner identities through teacher’s evaluations or even prompt evaluations. Prompted evaluations that draw strong boundaries between learner’s productions and performances (C⁺⁺) are a necessary inclusion in South African lesson plans.

It was only in the final stages of phonic cycles, during activities of dictation and spelling tests, that teachers were prompted to evaluate learner performances in ways that were differentiating in the NECT, PILO and FW LP programmes. The FW TG, however, coded C⁰ in these testing activities and this is explained by the limited scripting and the nature of activity descriptions. In typical introductory and revision parts of phonics cycles, evaluations were largely uncontrolled thus potentially reinforcing a communalised pedagogy in typical phonics lessons where teachers engage in teacher-led explications. Lesson plans have the potential to shift this practice, in listing prompts that encourage teachers to evaluate, and respond to learners' performances in oral and expository sessions of phonics instruction.

This research, ultimately, makes a contribution by extending Bernstein's tool of classification to identify individualizing or communalizing pedagogies through the classification of pedagogic subjects.

5.2.4. The need for the strong framing of evaluative criteria

Phonics, generally, has low and finite, although highly generative, levels of disciplinary knowledge but requires higher levels of pedagogical content knowledge which are generally not offered throughout any of the programmes. The view that more pedagogical content knowledge is to be offered throughout these materials is supported by Mason and Snow in their evaluation of the FW TG where they recommend the provision of a "detailed rubric that provides teacher guidance for evaluating student learning and provides support for struggling students" (Mason & Snow, 2021, p. 19). They further conclude that "little guidance is provided for teachers in the event of students struggling with particular skills or concepts. Greater specificity of learning targets and suggested modifications for the inevitable student who struggles would be beneficial" (Mason & Snow, 2021, p.21).

This view is shared by Shalem et al (2014) in their analysis of the GPLMS who state that "an indication to help teachers establish whether they had achieved the outcome of the lesson, or that learners had understood" should be provided in lesson plans. For this to be done, lesson plans would have to be expanded. Shalem et al, however, view heavier scripting as a further constraint on teacher's autonomy and creativity, and find themselves in the middle of scripting debates which are discussed in the section following.

The PILO programme was the only programme to show strong external framing over evaluative criteria through offering, prior to every lesson, a lesson focus and an outline of content, concepts and skills. An example is offered below. These listed outcomes could act as a rubric for teachers to assess learner's attainment to some extent, although these outcomes are very generalised and are generally the same across every phonics lesson. Making these rubrics more particular to the lesson at hand would be more beneficial and could provide a means by which to improve teacher's pedagogical content knowledge.

Image 5.3.4.1. Extract from PILO showing strong external framing over evaluative criteria through listing content, concepts and skills of this kind prior to every lesson.

CONTENT CONCEPTS SKILLS	• <u>Revises the previous term's sounds</u> • <u>Teaches double sounds: qh, ch, th, xh, hh, dl, hl, kl</u> • <u>Consonants must go together with vowels</u> • <u>Identifies the sounds that have been learnt in words</u> • <u>Builds words using the sounds learnt</u> • <u>Reads words using the knowledge of sounds learnt</u> • <u>Breaks words into syllables and sounds</u> • <u>Learns to spell at least 5 words with each sound learnt</u> • <u>Writes at least 5 words with sounds learnt</u> • <u>Recognises consonant blends in words (double consonant blends and digraphs)</u> • <u>Combines vowels and consonants to build syllables</u> • <u>Learns to spell 10 words per week</u>
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5.2.5 Scripting

Piper et al's (2018) report investigating the effectiveness of teacher guides in the Global South considered levels of scripting against programme impact. Using gains in oral reading fluency, Piper et al found that for every 10 additional scripting index points, programme impacts decreased by 1.4 correct words per minute. As such, they cautiously argue that heavily scripted programmes may be less effective than more structured programmes and that although "scripting appears to improve learning outcomes in general, beyond a basic threshold of scripting, it can detract from overall programme effectiveness" (Piper, et al, 2018, p. 13).

The FW TG followed the recommendations of Piper et al and showed the lowest levels of scripting and falls within descriptions of structured teacher guides (Mtatse and Verbeek, forthcoming). The FW TG generally prompted the teacher's voice in activity descriptions and these prompts were seen to decrease exponentially through the terms. By Term 3, the level of scripting had fallen from 363 words in activity descriptions across one phonics cycle in Term 1, to 86 words. This shows a 76.3% decrease in the levels of scripting.

The PILO and FW LPs showed the highest average word counts in activity descriptions. More than this they showed the strongest framing over sequence and the relaying of evaluative criteria. To a large extent, they scripted both teacher's voice –what he or she is to say – and teacher's actions. The NECT lesson plans showed scripting to a lesser degree but in much the same way as the PILO and FW LP programmes.

As the analysis showed, however, the decrease in scripting correlated to less controls regulating pedagogy. This was particularly evident in the Funda Wande Teacher Guide (FW TG) where there was no evidence of controls in the classification of pedagogical subjects through interactions and evaluations, as well as in controls on the social relation (or the framing of hierarchical rules). More than this, across intra-activity sequencing (the level of control within activities within lessons) and in the procedure of relaying evaluative criteria, controls were the weakest compared to those across the remaining three programmes. In total, the FW TG did not control 5 of the 14 indicators due to less scripting.

The assumption in the decrease in the level of scripting is that by the third term, for example, teachers are well-versed and familiar in the teaching routines stipulated by the guide so that they no longer need the support of the controls presented by scripted activity descriptions and teachers may practice autonomy and creativity in their teaching. This research raises the question as to whether it can be assumed that teachers no longer need the support of teacher guides from Term 1 to Term 3, despite Piper's claim that structured teacher guides that taper off the level of scripting seemed to show the greatest gains in learning outcomes. Piper et al's (2018) conclusion should be viewed cautiously, as Piper et al show through a regression analysis, that 88% of the gains in reading outcomes were explained by factors other than scripting.

5.3. Limitations of the study

This study has some limitations. Firstly, it did not focus on the 'content' of the phonics programmes to a great extent – this is a worthy endeavour. It very briefly reported on some of the general activities that were seen throughout each programme, commenting only on whether these activities were present or absent. Generally, the analysis tried to investigate the structure of the lesson plans, and increased focus was placed there.

Due to the various lesson plans structuring phonics instruction across different Home Languages from English to isiXhosa, Sepedi and isiZulu, it was found that the content of the programmes could not be fairly compared. Comparisons and conclusions were carefully drawn when using the International Literacy Association's report which provided recommendations for the teaching of *English* phonics. Although these recommendations were used as indicators with which to analyse the extent to which the various phonics programmes were effective, this was done cautiously so, in considering that what may be effective in English phonics programmes does not necessarily translate to other language programmes due to differences in orthographic and morphological structure.

5.4. Lesson plans and their potential

Lesson plans have the potential to shift teaching practice towards a kind of pedagogy that has been proved to show gains in early reading outcomes – such as increased individualising, well-sequenced and paced instruction that employs a contextualised approach to phonics instruction.

More so, lesson plans are one of the most cost-effective and scalable resource for school improvement currently, with the potential to shift pedagogy and improve early grade reading outcomes in South Africa.

This research argues for the strongly controlled exteriorisation of a contextualised and faster-paced phonics curriculum that supports teachers in enacting effective phonics instruction and relieves them of the difficult task of curriculum planning, through fully scripted lesson plans. The analysis also shows the importance of attending to features of effective phonics programmes, of supporting teachers in individualizing learners in instruction and making the conceptual evaluative criteria available. There are features of all four programmes analysed that could be attended to in developing effective, fit-for-purpose lesson plans for South African classrooms.

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APPENDIX

Appendix A: An outline and explanation of the indicators used for the classification and framing schema.

Below is an explanation and description of each of the 14 indicators that informed the analysis of this research. Descriptions of the indicators for the classification of discourses and agents will be taken in turn, followed by the indicators for the external framing of the discursive rules of pace, selection, sequence and evaluative criteria, and lastly, the external framing of the hierarchical rules.

Classification

Bernstein's tool of classification allows one to mark out and describe the relations between topics within the Home Language lesson plans. It allows the demarcation of discourses (phonics) in the lesson plans to be considered. The Home Language lesson plans, as aligned to CAPS, comprise several routines or activities. These routines include listening and speaking, phonics, handwriting, read aloud, shared reading, group guided reading, independent/paired reading and lastly, writing. These routines together comprise the subject Home Language, distinct from activities and routines seen in First Additional Language (FAL), Mathematics, and Life Skills across the foundation phase.

Inter-disciplinary relations can be exemplified using classification to distinguish the relation between different subject areas. Here, where classification is strong (C^{++}), phonics in Home Language is bounded and clearly demarcated from activities of other subjects in either FAL, Life Skills and Mathematics. Classification weakens where Home Language phonics is integrated into activities of other subjects. The coding schema for inter-disciplinary relations is seen below.

CLASSIFICATION OF INTER-DISCIPLINARY RELATIONS				
In the lesson topics/title.	The extent to which prompts boundary the relations between phonics and other foundation phase subject areas.			
	C^{++}	C^{+}	C^{-}	C^{--}
	Strong insulation of phonics to other subject areas.	Relatively strong insulation of phonics to other subject areas.	Relatively weak insulation between phonics and other subject areas.	No insulation between phonics and other subject areas.

	Clear demarcation between lessons allocated to phonics, and other activities in other subjects.	Relatively clear demarcation of phonics and other activities in other subject areas.	In some instances, the demarcation between phonics and other subject areas is blurred.	Phonics is not demarcated out from other activities across other subject areas in the foundation phase.
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The boundaries between the activities that comprise Home Language, measured along lines of classification, make explicit the **intra-disciplinary relations** *within* the subject of Home Language, where C⁺⁺ tells of strong boundaries between phonics and other Home Language literacy related activities, and C⁻⁻ tells of weak boundaries, where phonics may be integrated within other literacy related activities. This has implications for how phonics is defined, and how time allocations are given focus, and explicit attention drawn to phonics and the complexity of the relations between distinct kinds of knowledge within early grade literacy learning.

<u>INTRA-DISCIPLINARY RELATIONS (between activities in home language)</u>				
In lesson topic/title.	Relations between phonics and other reading/writing activities or routines.			
	C ⁺⁺	C ⁺	C ⁻	C ⁻⁻
	Strong insulation of phonics to other reading or writing activities.	Relatively strong insulation of phonics to other (non-phonics) reading and writing activities.	Relatively weak insulation between phonics and other (non-phonics) reading and writing activities.	No insulation between phonics and other (non-phonics) reading and writing activities.
	Clear demarcations between lessons allocated to phonics, and other reading or writing activities. Phonics is differentiated in topic and focus to other reading and writing activities in every instance.	Clear demarcation of phonics and other reading and writing activities. Some references, or links made, to other activities in phonics lesson.	In some instances, the demarcation between phonics and other reading or writing activities is blurred.	Phonics is not demarcated out from other reading or writing activities. Phonics is not assigned its own lesson and appears within other reading or writing activities.

Allocations of time dedicated to phonics, are aimed at developing letter-sound knowledge in order that learners may begin to decode texts. Skills of decoding through knowledge of these correspondences rely on the knowledge of other sub-skills. First is the knowledge of single sounds that make up spoken language, known as phonemic awareness. The second is knowledge of letters of the alphabet, or letter knowledge, the system of arbitrary symbols denoting sounds. Phonics is the bringing together of sounds and their allocated letter or letters and is the study of letter(s)-sound correspondences. Classification can be employed to mark out the **intra-intra disciplinary relations**, or the boundaries between these sub-skills of phonics, in determining how phonics is further defined, and the extent to which its sub-categories are made explicit in the lesson plans.

<u>INTRA-INTRA DISCIPLINARY RELATIONS (between sub skills of phonics)</u>				
In lesson topic, in how, or if, phonics is further classified.	Relations between phonics (letter sound correspondence) and its sub-skills (phonemic awareness and letter knowledge).			
	C⁺⁺	C⁺	C⁻	C⁻⁻
	Phonics activities are further insulated from other phonics sub-skills and activities.	Phonics activities are relatively insulated from other phonics-related activities.	Relatively weak insulation between phonics and other phonics-related activities.	Weak insulation between phonics and other phonics-related activities.
	Phonics is demarcated from other sub-skills.	Clear demarcations between phonics and other phonics-related activities, in lesson topic and focus, occur in most instances.	Unclear boundary between the lesson topic of phonics and other phonics related activity, in some instances.	No separation between phonics and other phonics related activities in how lessons topics and foci are defined.

Boundaries are not only seen between discourses, but also between agents within the pedagogical instance, either between transmitters and **pedagogical subjects** (learners) and between pedagogic subjects themselves. One can, using a regular classification coding schema, mark out the lesson plan's expectations for the relations between pedagogical subjects in two ways. First, in the way in which the teacher is to **interact** with learners, either collectively as a whole class or as

individuals. Where learner's pedagogic identities are differentiated, where the teacher is to direct questions to or interact with individuals or differentiated groups, a code of C^{++} is allocated, showing an attempt to regulate strong demarcations between pedagogic subjects. C^{-} shows a tendency for the lesson plans to encourage undifferentiated interactions from the teacher between a group of acquirers, where prompts refer to the class as 'learners' always. This indicator, after a preliminary analysis, had to be extended to include C^0 , where it was found that boundaries between pedagogical subjects could not be discerned from the data and it was unclear as to how teachers should interact with the learner/s.

<u>RELATIONS BETWEEN PEDAGOGICAL SUBJECTS (through interactions)</u>					
In the way that teachers are prompted to refer to, direct questions, or direct tasks to learners within the lesson.	The extent to which the prompts in activity descriptions encourage teachers to differentiate their interactions among learners during teaching.				
	C^{++}	C^{+}	C^0	C^{-}	C^{--}
	Prompts encourage teacher's interactions with learners to be differentiating and individualizing	Teacher's interactions with learners are sometimes differentiating and individualizing	Prompts guiding teacher's interactions cannot be observed.	Teacher's interactions with learners are undifferentiating and communalizing, most of the time.	Teacher's interactions with learners are always undifferentiating and communalizing.
	Teachers are prompted to refer to, or direct questions or prompts to individual learners, or differentiated groups to elicit individualized learner participation in every case .	Teachers are prompted to refer to, or direct questions or prompts to individual learners, or differentiated groups in some cases, thus eliciting individualized learner participation in some cases.	It is unclear how teachers are to interact with learner/s throughout the lesson.	Teachers are prompted to refer to, or direct questions or prompts to the whole class in most cases, in order to elicit whole class or communalized participation by learners.	Teachers are prompted to refer to, or direct questions or prompts to the whole class in every case, in order to elicit whole class or communalized participation by learners.

Boundaries between pedagogical subjects can be discerned, secondly, through the lesson plans attempts to regulate how a teacher is to *evaluate* learner productions. Where prompts encourage teachers to mark out and evaluate individual performances or consider individual productions, a C⁺⁺ is noted. Where teachers are given prompts that check learners' general understanding, where learners' productions are implied to be homogenous, a score of C⁻ is allocated. This indicator, too, had to be extended to include C⁰ where no prompts regarding teacher's evaluations were observed. See table below.

CLASSIFICATION OF PEDAGOGIC SUBJECTS (through evaluations)					
In the way that teachers are prompted to 'read' and evaluate learner performances and productions.	The extent to which prompts encourage teachers to evaluate in ways that are individualising				
	C ⁺⁺	C ⁺	C ⁰	C ⁻	C ^{- -}
	Prompts entail that learner's productions are read and evaluated in a differentiating manner, in ways that imply individualised learner productions, all or most of the time.	Prompts entail that learner's productions are read and evaluate in a differentiating manner, in ways that imply individualised learner productions, some of the time.	Prompts do not attempt to control evaluations of learner productions.	Prompts entail that learner's productions are read and evaluated in a communalised way some of the time.	Prompts entail that learner's productions are read and evaluated in a communalised way, all of the time.
	Teachers all, or most of the time are prompted to view (read) learner's responses and productions in ways that are differentiating. Teachers are prompted to consider and evaluate individual	Teachers, some of the time, are prompted to view (read) learner's responses and productions in ways that are differentiating. Teachers are prompted to consider and evaluate individual	Prompts guiding teachers in the evaluations of learner productions are not observed.	Teachers are to 'read' or evaluate learner's responses and productions, some of the time, in ways that are communalising, where learner's understandings are referred to as undifferentiated. Prompts such as 'check learners understanding', as if	Teachers are prompted to 'read' or evaluate learner's responses and productions in ways that are communalising all of the time, where learner's understandings are referred to as undifferentiated. Prompts such as 'check learners understanding',

	learner's productions. Prompts such as "mark learners work and make a note of who needs additional support", etc. are evident.	learner's productions.		'understandings' are homogenous, occur some of the time.	as if 'understandings' are homogenous, occur most, if not all, of the time.
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External Framing: the extent of 'control'

External framing of time refers to the regulation the lesson plans hold on time in an extent to **control pace** in pedagogy. The strongest controls on time come from both inter-activity (most commonly seen) allocations of time, demarcating time between lessons or periods, alongside intra-activity allocations, which govern the amount of time spent on tasks *within* lessons. Lesson plans that utilize both forms of control score $F^{(e)++}$, whereas $F^{(e)--}$ denotes an absence of control over time on an instance of intended pedagogy.

<u>DISCURSIVE RULE OF PACE</u>				
In the prescription of time allocations for phonics lessons.	The extent to which the lesson plan determines the demarcation of time across lessons.			
	$F^{(e)++}$	$F^{(e)+}$	$F^{(e)-}$	$F^{(e)--}$
	Strongly controlled.	Controlled	Relatively uncontrolled	Uncontrolled
	Inter-activity and intra-activity time allocations are prescribed.	Only inter-activity time allocations are prescribed.	Inter-activity time allocations are prescribed in only some instances.	No time allocations are prescribed.

Turning toward selection, instances of control over selection – of what is allowed within the intended pedagogic instance – appears in the regulation of the content (both inter-lesson and intra-lesson), and in the regulation of resources. **Inter-lesson controls of selection** refers to the lesson

plans control over the selection of the phonics across the programme. In other words, this determines the control over the phonics programme, whether it is determined by the lesson plan in every instance, or whether the lesson plans yields control to the teacher in determining the target sound of a lesson. Where $F^{(e)++}$, framing is strong, and the lesson plan prescribes a phonics programme, and where $F^{(e)-}$, framing is weak and the lesson plan does not prescribe a phonics programme.

<u>DISCURSIVE RULE OF SELECTION (INTER-LESSON)</u>				
Over the target sound of focus across the phonics programme.	The extent to which the lesson plan controls the selection of target sounds across a phonics programme			
	$F^{(e)++}$	$F^{(e)+}$	$F^{(e)-}$	$F^{(e)--}$
	Controlled and determined by the lesson plan in every instance.	Controlled and determined by the lesson plan in some instances.	Not controlled by the lesson plan in some instances.	The lesson plan does not attempt to control the selection across the programme
	The selection of target sounds across the phonics programme is prescribed in every instance.	The selection of target sounds across the phonics programme is prescribed in some instances.	The lesson plan does not control the selection of target sounds across some of the programme.	The lesson plan does not intend to control the selection of the phonics programme.

Phonics teaching requires that the correspondence of sound and letter be established, through the use of words as examples or illustrations which emphasize the target sound. Whether these examples and representations are prescribed by the lesson plans are of particular focus here, in the external framing of the discursive rule of **selection of instructional knowledge within the lesson (intra-lesson)**. Where external framing is weak ($F^{(e)-}$), the lesson plan does not intend to control the selection of examples or representations of sound or spelling patterns and yields these to teacher discretion and expertise. Where the lesson plan intends to control every instance of this selection $F^{(e)++}$ is noted. The presentation of representations has important implications for ensuring the explicit instruction of phonics.

<u>DISCURSIVE RULE OF SELECTION (INTRA-LESSON)</u>				
Over the provision of examples and representations during the relay of instructional knowledge.	The extent to which the lesson plan controls the selection of instructional knowledge in the lesson.			
	F^(e) ++	F^(e) +	F^(e) -	F^(e) --
	Controlled and determined by the lesson plan in every instance.	Controlled and determined by the lesson plan in some instances.	Controlled and determined by the teacher in some instances.	Controlled and determined by the teacher in most instances.
	Examples and representations are specified by the lesson plan in all instances.	Examples and representations are specified by the lesson plan in some instances.	The lesson plan allows the teacher to provide his/her own examples and representations, or direct learners to provide examples in some cases.	The lesson plan does not intend to control examples or representations of the target sound. The teacher is expected to determine these or the learners are to present examples in every case.

The extent to which intervention-provided resources are controlled can be established along the regular notations of $F^{(e)++}$, $F^{(e)+}$, $F^{(e)-}$ and $F^{(e)--}$. Instances of the strongest framing occur when the lesson plans script the use of intervention-provided (neoteric) items – the learner, teacher support materials (LTSM) - in every instance of use. Framing weakens when intervention resources are stipulated for use in the lesson some of the time ($F^{(e)+}$), to not scripted sometimes ($F^{(e)-}$), and when no resources are listed despite their intended use in the lesson ($F^{(e)--}$). See the table below.

<u>DISCURSIVE RULE OF SELECTION OVER LTSM RESOURCES</u>				
Over the stipulation of intervention resources	The extent to which the lesson plan attempts to control the resources required for teacher's enactment and learner's participation in the lesson.			
	F^(e) ++	F^(e) +	F^(e) -	F^(e) --

needed for the lesson, either in resource allocations, or in activity descriptions.	Neoteric intervention resources are controlled by the lesson plan in every instance.	Neoteric intervention resources are controlled by the lesson plan some of the time.	Neoteric intervention resources are sometimes uncontrolled.	Neoteric intervention resources are uncontrolled.
	All the novel resources provided by the intervention that are to be utilized in the lesson's enactment are referenced in the lesson plan in every instance of use.	Intervention-provided resources that are to be used in the lesson's enactment are referenced in the lesson plan some of the time.	No reference is made to the intervention-provided resources despite their use, some of the time.	No intervention-provided resources are referenced despite their use.

Indicators were developed to show the extent to which the lessons within phonic cycles were controlled. It was determined that in all cases, the lesson plans control inter-activity sequencing. A second framing of sequencing indicator was developed, called intra-activity sequencing, analysing the strength of the framing between the order of activity completion within single lessons. In all cases, the lesson plans attempt to exteriorize sequencing of activities (intra-activity) and lessons (inter-lesson) (Shalem, 2016). However, the guidance offered to teachers in delivering the desired sequence of activity was found to be variable across the four programmes, and as such the following indicator was developed.

<u>DISCURSIVE RULE OF SEQUENCING (INTRA-ACTIVITY)</u>				
In the nature of activity descriptions and the extent to which they offer script or structure in ordering the	The extent to which the lesson plan attempts to control the sequence or order of activity within the lesson.			
	F^(e) ++	F^(e) +	F^(e) -	F^(e) --
	A full script controls the order of intra-lesson activities.	A detailed script controls the order of intra-lesson activities.	Highly structured activity descriptions control the order of intra-lesson activities.	Loosely structured activity descriptions control the order

sequencing of activities intra-lesson.				of intra-lesson activities.
	The order of activity is fully scripted in almost all cases. Highly detailed and particular scripting of the order of lesson activities is evident. The teacher is meant to read directly from the lesson plan to students in the pedagogical act.	The order of activity is scripted to some extent. Detailed prompts guiding the order of activities, but the delivery of the script requires some re-interpretation on the part of the teacher.	The lesson plan provides a high amount of structure but does not script in detail. Activity descriptions offer some guidance in how activities are to be completed.	The lesson plan provides a very loose structure of lesson activity in most cases. Activity descriptions do not offer guidance in how activities are to be completed.

The indicator that was developed aimed to capture the **degree of scripting** using the idea of structure versus scripting. “[Lesson plans] can range from fully scripted (i.e. where the teacher is meant to read directly from the guide to students) to highly structured (i.e. the guide includes general guidance of activities within a lesson but does not script instruction word for word)” (World Bank Group, 2021, p. 6; Piper, et al, 2018). Fully scripted activity descriptions coded $F^{(e)++}$, to general structure, coding $F^{(e)-}$.

The external framing of the evaluative criteria refers to the amount of control the lesson plans hold on the transmission of the instructional knowledge pertaining to the meaning of concepts, principles and their appropriate realization” (Hoadley, 2006, p. 685). Upon looking at the nature of the prompts it became evident that there were two types of control over evaluative criteria in the lesson plans: what I will call procedural and conceptual controls.

Procedural controls over evaluative criteria refer to the extent of the explicitness of the prompt to relay evaluative criteria. In other words, the extent to which activity descriptions, using concise and clear prompts, direct teachers to relay appropriate meanings, principles and tasks for realization. The framing over the procedure of relaying evaluative criteria is of concern here, where $F^{(e)-}$ refers to prompts that place the responsibility of the relay of evaluative criteria onto the teacher. Prompts are thus implicit, and the relay of evaluative criteria is implied. Oppositely, strong

framing over the procedure of relaying evaluative criteria is seen through explicit and clear prompts, which require no teacher interpretation, only delivery. See below.

EXTERNAL FRAMING OVER DISCURSIVE RULE OF EVALUATIVE CRITERIA (PROCEDURAL)				
In the explicitness of the prompt directing teachers to relay meaning of concepts and principles of their appropriate realisations.	The extent to which the lesson plans regulate the relay of the evaluative criteria, or control “the transmission of the instructional knowledge pertaining to the meaning of concepts and principles and their appropriate realisations” (Hoadley, 2006, p. 685)			
	F^{(e)++}	F^{(e)+}	F^{(e)-}	F^{(e)--}
	Prompts controlling the relay of evaluative criteria are explicit and clear most, if not all, of the time.	Prompts controlling the relay of evaluative criteria are explicit and clear some of the time.	Prompts controlling the relay of evaluative criteria are somewhat implicit and quite unclear.	Prompts controlling the relay of evaluative criteria are implicit and unclear.
	Prompts directing teachers to make the evaluative rules available through exposition are explicit and clear. Prompts to define and explain the meaning of concepts, address key aspects of the knowledge or operation under discussion through questioning and explication, or relaying task instructions, are clear and explicit all of the time.	Prompts directing teachers to make the evaluative rules available through exposition are quite explicit and clear some of the time. Prompts to define and explain the meaning of concepts, address key aspects of the knowledge or operation under discussion through questioning and explication, or relaying task instructions, are quite clear and explicit some of the time.	Prompts implicitly direct teachers to relay evaluative criteria to learners some of the time. Prompts to explain and describe concepts and instructions for tasks are implicit and unclear some of the time. Some interpretation is required on the part of the teacher in enacting the prompt. The teacher controls the relay of evaluative criteria in some instances.	Prompts implicitly direct teachers to relay evaluative criteria to learners. Prompts to explain and describe concepts and instructions for tasks are implicit and unclear. Some interpretation is required on the part of the teacher in enacting the prompt. The teacher controls the relay of evaluative criteria in every instances.

The scripting of the procedure for relaying the evaluative criteria may not always match the availability of the evaluative criteria – the concepts, definitions or meanings – that are to be relayed. These are the **conceptual controls** over the framing of evaluative criteria, and this refers to the presence, or absence, of the evaluative criteria that are required for transmission in varying degrees. Where evaluative criteria are present in the lesson plans, there is strong external framing

over the conceptual aspects of the evaluative criteria or $F^{(e)++}$. Dissimilarly, $F^{(e)-}$ denotes weak external framing over the conceptual aspects of the evaluative criteria, or where evaluative criteria are implicit. See the expanded table below.

<u>DISCURSIVE RULE OF EVALUATIVE RULE ('CONCEPTUAL' OR AN EXPLICATION OF THE 'RULE' TO BE RELAYED)</u>				
In the lesson plan's activity description, lesson focus, lesson topics, assessment prompts.	The extent to which the lesson plan makes explicit the evaluative criteria of the instructional knowledge pertaining to the meaning of concepts and principles and their appropriate realization (Hoadley, 2006)			
	$F^{(e)++}$	$F^{(e)+}$	$F^{(e)-}$	$F^{(e)--}$
	The evaluative criteria are present and explicit.	The evaluative criteria are present and quite explicit.	The evaluative criteria are implicit some of the time.	The evaluative criteria are implicit.
	The lesson plans always or mostly always make the evaluative criteria available either through exposition prompts, definitions and outline of concepts, explanations and key aspects of the knowledge under discussion or the tasks and their criteria under completion.	The lesson plans make the evaluative criteria available most of the time either through exposition prompts, definitions and outline of concepts, explanations and key aspects of the knowledge under discussion or the tasks and their criteria under completion.	The concepts and principles being addressed in the exposition are sometimes present. Very little attempt is made to make the requirements for the successful production of a text/completion of an activity available.	Generally the lesson plan does not provide evaluative criteria for the transmission of concepts and principles in instructional practice. Very little or no attempt is made to make the requirements for the successful production of a text/completion of an activity available.

The external framing of **hierarchical rules** refers to the control over the social relation between teachers and pedagogical subjects, or the ways in which the social relation is imagined. This can be discerned through the language used to refer to the pedagogical act of teaching, which may encourage teachers to work indirectly on learners where their authority appears hidden or masked (Bernstein, 1975). This framing receives $F^{(e)-}$. In other instances, the pedagogical task of the

teacher appears is to act directly and with authority, upholding strong positional relationships between the teacher and the learners. This unmasked authority receives $F^{(e)++}$. Consider the coding scheme below.

<u>HIERARCHICAL RULE</u>				
In the way the lesson plan describes activities of teaching, in the terms used, to encourage a particular kind of social relation between teacher and acquirer.	The extent to which the lesson plan makes formal or informal the social relation between teacher and learner.			
	F⁺⁺	F⁺	F⁻	F⁻⁻
	Unmasked T authority	Usually unmasked T authority	Usually masked T authority	Masked T authority
	Activity descriptions and prompts construct or maintain positional relations between teacher and learners, where the teacher holds a clear and unmasked line of pedagogical authority, where he/she is tasked to work directly on the learner/s in every instance. Can be seen in terms such as “teach” or “tell” or “explain”.	Activity descriptions and prompts construct or maintain positional relations between teacher and learners, where the teacher holds a clear and unmasked line of pedagogical authority. Terms such as “teach” or “tell” or “explain”, are used some of the time.	Activity descriptions or prompts construct or maintain more personal/informal relations, some of the time, between teacher and learners, where the teacher’s power is masked/hidden by devices of communication and the teacher appears to work indirectly on the acquirer” (Bernstein, 1975, p.62). Can be seen in terms such as “brainstorm with...”, “remind”, etc.	Activity descriptions or prompts construct or maintain personal relations between teacher and learners in every instance, where the teacher’s power is masked/hidden by devices of communication and the teacher appears to work indirectly on the acquirer” (Bernstein, 1975, p.62). Can be seen in terms such as “brainstorm with learners”, “remind”, etc