

**DRAFT NATIONAL POLICY FOR THE PROVISION AND
MANAGEMENT OF LEARNING AND TEACHING
SUPPORT MATERIAL (LTSM)**

FOR PUBLIC COMMENTS

DRAFT

Table of Contents

1. Glossary.....	3
2. Introduction	6
3. Background	7
4. Guiding Principles	7
5. Vision.....	9
6. Legislative Context	9
7. Key Elements of the Policy.....	10
7.1. Policy Objectives	10
7.2. Statements of Policy	10
7.3. Decentralised Development and Centralised Procurement	12
7.4. LTSM development	12
7.5. Intellectual Property	12
7.6. Quality Assurance	13
7.7. Processes for the development of a National Catalogue for Core LTSM	14
7.7.1. Criteria for the screening of commercially produced textbooks	14
7.8. Two Tier Procurement Model	17
7.8.1. Centralised Procurement Model for Core LTSM:	18
7.8.2. A Decentralised Procurement Model	20
7.8.3. Procurement of core and supplementary e-LTSM or digital resources for all public schools	
8. LTSM Retention and retrieval	22
9. Monitoring, supporting, reporting and evaluation.....	26

1. Glossary

Universal provision – means provision of a textbook per subject per learner

National Catalogue - means the nationally approved list of Core LTSM, which is screened and endorsed by the Department of Basic Education

Learning and Teaching Support Material (LTSM) - means a variety of learning and teaching materials used in classroom. These range from teachers and learners created resources to commercially produced classroom resources such as wall charts, workbooks, textbooks, e-books, readers, stationery, science kits, dictionaries, encyclopaedias etc.

e-LTSM -The e-book is a book composed in or converted to digital format for display on a computer screen or handheld device.

Core LTSM - refers to the category of LTSM that is central to teaching the entire curriculum of a subject for a Grade. Generally, this would comprise a textbook/learner book, workbook and teacher guide. For the Foundation and Intermediate Phases, this includes graded readers. In the Intermediate Phase, this includes a core reader for the teaching of literature. In the Senior Phase this includes a core reader and a novel for the teaching of literature. For Further Education and Training this includes set works.

Supplementary LTSM - refers to LTSM in addition to the Core LTSM, is generally used to enhance a specific part of the curriculum. Examples include a geography atlas, dictionaries, Science, Technology, Mathematics, Biology apparatus, electronic/technical equipment etc.

Open Education Resources - means LTSM that is created by an external party and made available for use at no cost; educational materials that can be used for teaching, learning, research, and other purposes at no cost.

Teacher Created Resources - means material created by teachers for use in their classrooms.

Classroom Resources - refers to material used in the classroom by the teacher and/or learners to aid learning and teaching. Examples include wall charts, alphabet friezes, flashcards etc.

Teacher guide - refers to a publication of systematically organised material, comprehensive enough to enable the teacher to cover the primary objectives outlined in the curriculum of a particular subject for the entire grade. It would include an exposition of the curriculum content in a pedagogically sound manner, which includes information and background on the content to be taught, learner activities and assessments.

Workbook - refers to a publication of systematically organised activities, comprehensive enough to cover the primary objectives outlined in the curriculum of a particular subject, or a particular aspect of a subject, for the entire grade. Learners have to complete the activities in the publication. There are also workbooks that could be considered part of supplementary LTSM that covers part of the curriculum, e.g. phonics or handwriting.

Learner Book/textbook - refers to a publication of systematically organised activities and information and background on the content to be taught, comprehensive enough to cover the primary objectives outlined in the curriculum of a particular subject for the entire grade. Unlike a workbook, learners would not complete the activities in the publication but would record their answers in an exercise book or other additional resource.

Big Books - refers to large readers intended for shared and guided reading by the teacher.

Core Reader - refers to a single reader used in the Intermediate and Senior Phases, which contains a collection of genre required for the grade for Home Language and First Additional Language.

Graded Readers – refers to mainly group guided readers in both Home (Grades R to 3) and First Additional Language (Grades 1 to 3). Graded Readers are differentiated to cater for a range of reading abilities. Graded readers include among other things (fantasy, folk tales, traditional tales, plays and poems.). Graded Readers cater for emergent, beginner, and developing, fluent and independent reading levels.

DRAFT

2. Introduction

This policy is intended to guide the provision and management of Learning and Teaching Support Material (LTSM) including textbooks, home economics equipment, science laboratory equipment, etc.

The LTSM policy is aimed at all levels in the system, from the Department of Basic Education (DBE) to provinces, districts and schools.

Key elements of LTSM provision and management addressed in this policy are as follows;

- Development and production of LTSM;
- Development of the National Catalogue of Core LTSM;
- Procurement of LTSM;
- LTSM Retention;
- Utilisation of LTSM; and
- Monitoring and evaluation of provision and management of LTSM.

For the purposes of this policy, Learning and Teaching Support Material (LTSM) is used as contemplated in Section 21 of the South African Schools Act 1996 (No. 84 of 1996) to include:

- Stationery and supplies;
- Learning material;
- Teaching aids; and
- Science, Technology, Mathematics and Biology apparatus;

3. Background

The LTSM policy has been introduced to ensure that all the injustices and inequalities of the past, with regards to learner support, are addressed. The policy ensures production and selection of quality LTSM, and makes such available to all learners in public schools

Every learner and teacher must have access to the minimum set of core material required to implement the National Curriculum Statement Grades R-12.

The issue of textbook coverage has two dimensions, addressed in this LTSM policy, namely supply and retention. In addition to coverage, the other key elements of optimal LTSM usage for improved educational outcomes are ensuring appropriate quality of the material.

4. Guiding Principles

Redress and equity

Redress and equity are fundamental principles enshrined in the South African Constitution. Redress and equity within the LTSM provisioning context are crucial, as the injustices of the past had to be corrected. These require working with inherited systems to provide the most equitable solution.

Social cohesion

Social cohesion requires and recognising the value of a functional LTSM provisioning in the building of community and social capital and reflecting the culture and values of the school and broader community.

Resource provision

Learners and teachers have to be provided with a wide variety of curricular resources, exposing learners to diverse ideas, experiences and opinions. This will

engender respect for diversity and democracy. Resource provision ensures that every learner and every teacher has access to a range of quality resources that are age appropriate, current and relevant, and which inculcate a love of reading and encourage the enquiring mind.

Flexibility of access

This refers to enabling access to the resources, including digital resources throughout the school day, and after school. This must accommodate universal access for Inclusive education.

Accountability

All resources should be properly accounted for through a strong administrative and management programme.

Independent learning

All learners and teachers should be information literate and independent lifelong learners and readers. This involves providing a broader base of provision including an information service for youth towards building the kind of knowledge society which South Africa aspires.

Learner support

Learners should be supported in the acquisition of information literacy skills, including digital literacy, to access, process and use information resources in various formats; printed media, audio-visual and digital formats e.g. e-books, where accessible and appropriate. Furthermore a culture of reading and writing must be instilled in them.

5. Vision

The long-term vision for the provision of LTSM is to ensure the following:

- Learners and teachers have access to quality learning and teaching materials to meet the requirements of the curriculum. The national Guidelines for the Minimum Schoolbag, describe the minimum quantity and quality of materials which must be made available to each learner.
- Teachers receive the training they require to continuously improve their use of LTSM and to become confident in their profession.
- Parents are informed about what happens in the school and are aware of their responsibilities in the LTSM usage and retention.
- Learners are aware of the importance of doing their schoolwork, in school and at home utilising LTSM appropriately.
- Learners are taught fundamental skills on how to find, collect, analyse, synthesise and use information

The supply, usage and retention of LTSM must be a collaborative effort by all stakeholders in the LTSM sector, led by the DBE, supported by provincial officials, school administrators, teachers, learners and their parents.

6. Legislative Context

Section 3 of the National Education Policy Act 1996 mandates the Minister to provide direction so that the standards of education provision, delivery and performance are monitored.

The national LTSM norms and standards are underpinned by the responsibility of national and provincial levels of governments to honour the state's duty, in terms of the Constitution of South Africa (1996) and the South African Schools Act, 1996 to progressively provide resources to safeguard the right to education of all South Africans.

7. Key Elements of the Policy

7.1. Policy Objectives

The primary objective of this policy is to provide a systematic approach to the development, selection, procurement and utilisation of LTSM in South African public schools to ensure the equitable and comprehensive supply of LTSM. Furthermore, the policy aims to:

- (i) develop an environment that encourages and supports the production of high quality LTSM;
- (ii) ensure that an appropriate system of quality assurance is consistently applied to the selection of LTSM;
- (iii) provide co-ordination in the procurement, production and distribution of LTSM across the LTSM sector in order to best realise economies of scale;
- (iv) establish the conditions to support comprehensive access to all Core LTSM for learners and teachers in all South African public schools;
- (v) implement a systematic approach to LTSM retention, which ensures accountability and co-ordination of activities and responsibilities at the school, district, provincial and DBE levels;
- (vi) instil a sense of responsibility and clarify accountability for LTSM retention among learners, parents, teachers and school management; and
- (vii) create the conditions for optimal LTSM utilisation, through the provision of teacher training and awareness-raising among learners and their parents on optimal LTSM utilisation.

7.2. Statements of Policy

- (i) All forms of LTSM, including textbooks, e-books, workbooks, readers and teacher guides, purchased with government funds, produced through different processes or donated to a school constitute the property of the State, notwithstanding exceptions such as in the case of consumable material e.g. workbooks and learner's stationery .

- (ii) Departmental officials, school managers and other stakeholders in the LTSM sector must ensure the effective use of State funds and State property.
- (iii) All stakeholders must ensure that sound management processes are in place to manage the use of LTSM by teachers and learners, both at school and at home.
- (iv) A National Catalogue of Core LTSM issued by the DBE will list the approved material selected from open submissions or from other sources.
- (v) Other essential LTSM such as Science, Technology, Mathematics, Biology apparatus, electronic equipment, and other school equipment will be procured by provincial departments of education, schools, by DBE or as determined by the state.
- (vi) The DBE and provincial departments of education shall only provide material that passes appropriate evaluation and quality standards.
- (vii) The DBE shall establish the necessary LTSM standards to guide the production, publishing and manufacturing processes in the development of new material.
- (viii) The DBE shall use such standards in working with the local materials development, publishing and manufacturing stakeholders to improve the quality and cost effectiveness of material produced to support the implementation of the National Curriculum Statement Grades R-12.
- (ix) LTSM shall only be procured or produced through Government regulations, while allowing for participation by other stakeholders.
- (x) LTSM in the form of printed books shall be provided for the entire learner population in a regular cycle for each phase of schooling and for prescribed literature.
- (xi) LTSM in the form of e-books (e-LTSM) shall be provided as an alternative or an addition to printed textbooks.
- (xii) The effective retention of LTSM in the school system is an essential component of LTSM provision, to ensure that all learners have access to the required learning material. This requires an effective retrieval system and guidelines for maintenance. To ensure material in book form is retained in usable form for as long as possible, to minimum of five years.

- (xiii) The requirements and obligations emanating from this policy apply to all public schools.

7.3. Decentralised Development and Centralised Procurement

The adopted procurement approach in this policy is *decentralised approach*, to encourage the development of the best quality educational materials from a range of sources, and *centralised approach*, including a limited catalogue and centralised ordering to gain the greatest cost benefits.

7.4. LTSM development

The process of LTSM development may be undertaken by commercial companies, non-governmental organisations, Open Educational Resource initiatives as well as by internally producing / commissioning the development of LTSM for subjects where necessary, i.e. state publishing. In cases where the DBE commissions the development of material, all intellectual property and reproduction rights shall reside with DBE.

7.5. Intellectual Property

Given the different sources of LTSM development, different arrangements for intellectual property ownership shall apply and are as follows:

- (i) **Commissioned / state published material.** Where the DBE commissions or undertakes the development of LTSM, all intellectual property rights within the material shall reside with the DBE.

- (ii) **Use of a single source.** Where the DBE uses a single source (provider) for the development of LTSM, the intellectual property rights will remain with the creator (author) and producer, unless the DBE procures the copyrights from the creator.

- (iii) **Open Submissions.** Where the DBE calls for the submission of material and selects the most appropriate material, for example for the National Catalogue of Core LTSM, the intellectual property rights will be subject to agreement between creator and producer. In the case of commercially produced material listed in the National Catalogue for Core LTSM this will be publisher and author.
- (iv) **Open Education Resources.** Where educational resources are created and distributed on an 'Open Access' basis, the stipulated intellectual property regime shall prevail. For example, works under the Creative Commons license shall abide by the Attribution, Share Alike and Commercial or Non-Commercial stipulations.
- (v) **Teacher Created Resources.** Where material is created by a teacher for use in the classroom, the intellectual property shall reside with the particular teacher and/or school.

7.6. Quality Assurance

- In all instances of Core and Supplementary LTSM supplied by the DBE, such material will be independently assessed prior to use in schools.
- All Core LTSM will be subject to approval by the DBE for use in South African schools.
- All Supplementary LTSM will be subject to approval by Provincial Education Department (PED) for use in schools for curriculum delivery enhancement.
- Independent assessment implies that the producer or commissioning agent will not exert any undue influence on the assessment process and the assessment should be performed by experts not involved in the development process according to established screening criteria.

7.7. Processes for the development of a National Catalogue for Core LTSM

The DBE is committed to the provision of all quality core material to all learners either through the development of a catalogue of commercially developed material or through state publishing.

The development of a National Catalogue for commercially produced Core LTSM will be undertaken by the DBE. It will provide the list of Core LTSM approved for use in South African schools. The process used to develop a National Catalogue may include the following:

- (i) Issuing of *an Invitation and terms of reference to Submit Learning and Teaching Support Material for Evaluation and Adoption in the National Catalogue* to initiate the process of developing the National Catalogue for Core LTSM ;
- (ii) Holding of a Compulsory Briefing session with potential suppliers to ensure compliance with requirements and production specifications;
- (iii) A registration process for all intended suppliers;
- (iv) Payment of submission fees;
- (v) An independent screening process for all submitted material, conducted by qualified screeners and resulting in an evaluation report for all submissions. This screening process will constitute the national evaluation and quality standards assurance mechanism; and
- (vi) The compilation and distribution of a National Catalogue for LTSM. Each catalogue will be valid for a minimum period of five years, or earlier should there be a revision of the national curriculum. Thereafter a new process will lead to the development of a new catalogue.

7.7.1. Criteria for the screening of commercially produced textbooks

The national screening process for functionality will focus on assessing the following screening criteria for textbooks on a weighted basis:

- (i) Compliance with the Curriculum and Assessment Policy Statement. Material must present the main content, concepts and skills that support the instructional objectives for the subject and grade in the curriculum statements.
- (ii) Content analysis. The pedagogical approach should be sound and engage learners, while the content must be accurate and well explained.
- (iii) Activities and assessment. These should be clear and engaging for learners, while clearly related to the topic coverage and provide for interesting variety and be scaffolded in terms of complexity. They should be at an appropriate level for the grade.
- (iv) Level. The level of writing and explanation must be appropriate for learners of the intended grade.
- (v) Values. The text must be appropriate for learners in a diverse society and promote social transformation, and communicate values and attitudes consistent with the South African Constitution.
- (vi) Design and layout. The text must be well designed, attractive and accessible for learners of the intended grade.

For the Teacher's Guide, the screening criteria will focus on evaluating the effective mediation of the subject content for the grade, use of language that ensures teachers from diverse school contexts are able to understand, the provision of sufficient guidance in terms of planning, assessment, teaching methodology and the provision of useful activities and examples.

Selected titles will be listed on the National Catalogue for Core LTSM, with full details (including author, title, publisher, and ISBN). At the time of inviting submissions the DBE will establish guidelines for the specifications to ensure material is sufficiently durable to last the stipulated five year period. Publishers of the selected titles will make them available as e-books. The DBE and material developers must develop a procurement, delivery and utilisation model with regards to the provision of e-books.

In addition to functionality, consideration will be given to price and Government's commitment to economic growth by implementing measures to advance the development of Small, Medium and Micro Enterprises and historically disadvantaged individuals.

The development of a National Catalogue for State produced Core LTSM will be undertaken by the DBE. It will provide the list of LTSM developed and approved by the DBE for use in South African schools. The process used to develop a National Catalogue for state produced LTSM may include the formation of development teams, consisting of but not limited to, Subject specialists, Higher Education Institutions (HEIs), Non-Governmental Institutions, Government parastatals, Potential funders, etc.

The national development process for functionality will focus on ensuring that the following development criteria for textbooks are adhered to:

- (i) Compliance with the Curriculum and Assessment Policy Statement. Material must present the main content, concepts and skills that support the instructional objectives for the subject and grade in the curriculum statements.
- (ii) Content analysis. The pedagogical approach should be sound and engage learners, while the content must be accurate and well explained.
- (iii) Activities and assessment. These should be clear and engaging for learners, while clearly related to the topic coverage and provide for interesting variety and be scaffolded in terms of complexity. They should be at an appropriate level for the grade.
- (iv) Level. The level of writing and explanation must be appropriate for learners of the intended grade.

- (v) Values. The text must be appropriate for learners in a diverse society and promote social transformation, and communicate values and attitudes consistent with the South African Constitution.
- (vi) Design and layout. The text must be well designed, attractive and accessible for learners of the intended grade.

For the Teacher's Guide, the screening criteria will focus on evaluating the effective mediation of the subject content for the grade, use of language that ensures teachers from diverse school contexts are able to understand, the provision of sufficient guidance in terms of planning, assessment, teaching methodology and the provision of useful activities and examples.

Developed titles will be listed on the National Catalogue for Core LTSM, with full details (including, title, and ISBN and all relevant details).

Each catalogue will list one book per subject, per grade per language and will be valid for a minimum period of five years, or earlier should there be a revision of the national curriculum. Thereafter, a new process will lead to the development of a new catalogue.

7.8. Two Tier Procurement Model

The wide range of material classified as LTSM is broad to cater for the variety of educational resources needed within schools. Within this range the procurement of LTSM must prioritise the provision of consumable items, e.g. stationery for learners, and a minimum set of textbooks for every learner for every subject as stipulated in the Minimum Schoolbag Guidelines.

To cater for this wide range of material a two tier model can be used for procurement as follows:

A centralised procurement model in which provinces or the DBE procure Core and other essential LTSM such as Science, Technology, Mathematics, Biology apparatus.

A decentralised procurement model wherein schools individually purchase supplementary materials.

7.8.1. Centralised Procurement Model for Core LTSM:

All public schools whether or not they have been granted function section 21(1)(c) status will participate in a centralised procurement system for the procurement of Core LTSM. Centralised procurement of Core LTSM will be managed by provincial departments of education or by the DBE.

Where one or more texts for a subject per language per grade are selected from the National Catalogue by a Bidding Committee, the Bidding Committee will procure LTSM in line with the Public Finance Management Act (PFMA) to ensure the best cost-efficiency in selecting from the National Catalogue. The criteria outlined below will also apply for state developed LTSM.

In implementing a centralised procurement system, the following steps should be followed by provinces:

(i) The formation of a provincial LTSM Committee

A provincial LTSM Committee should be formed to manage the procurement and distribution process in a province. Committee members should include representatives from LTSM, Curriculum, Supply Chain Management, EMIS and Finance under the chairmanship of a DDG or Senior General Manager.

(ii) The development of an annual LTSM Procurement and Distribution Plan

All provinces must develop and implement a LTSM Procurement and Distribution Plan. The plan must include the allocation of budgets. In view of the need to provide core textbooks and supplementary materials including library resources to all schools, provinces may retain the core textbook funds from the total allocation of a

school's Norms and Standards budget. The funds allocated for library resources must be at least 30% in all schools.

(iii) Requisitioning

Each school must complete a requisition form for the ordering of Core LTSM. For Core LTSM a requisition form must indicate the estimated number of classes and learners per grade, language and subject for the following year and the required quantities.

(iv) Ordering

- Completed requisition forms should be delivered to the District / Province, in electronic or print form.
- Requisition forms must be signed by the principal and the chairperson of the School LTSM Committee certifying that the information submitted is correct.
- The data submitted will be collated by the District / Province and used for the centralised procurement process.
- The consolidated orders will be placed with publishers/suppliers or delivered by the state.

(v) Receiving

- The provincial education departments should manage the distribution of core and supplementary LTSM to schools.
- In line with audit requirements, the principal must inform the provincial education department of the names and signatures of the officials at the school, who are authorised to receive and certify Proof of Deliveries (PODs) of LTSM delivered to the school.
- Before the PODs are certified as correct, the items delivered must be checked against the items listed on the requisition form to ensure that only items that were ordered are delivered.
- One of the official signatories who have the authority to receive LTSM, checks, signs and files a copy of the POD. LTSM suppliers or DBE must

deliver the orders within the specified period and according to the official order.

(vi) Recording and safe keeping

- When LTSM is delivered to the school, titles and quantities must be entered into the school's textbook inventory.
- The books must be stamped and given a unique number. All LTSM must be kept safely in a storeroom whilst not in use.
- The DBE /provincial education departments have the right to visit schools at random to check if LTSM has been delivered according to specification and that they are recorded safely stored and effectively utilised.

This model may also be used by provinces for the procurement and distribution of certain categories of supplementary LTSM.

7.8.2. A Decentralised Procurement Model

Procurement of supplementary LTSM by Section 21.1.c schools. The decentralised procurement model allows for school-level procurement of supplementary LTSM for Section 21.1.c. schools based on the preference of an individual school and managed by the school's LTSM Committee. In implementing a decentralised procurement system the following steps should be followed:

(i) The formation of a School LTSM Committee

A School LTSM Committee should be formed in each school to guide the procurement process in a school. Committee members may include subject or phase specialists, members of the School Governing Body and the school's Senior Management. All members must sign a Declaration of Confidentiality and Impartiality to ensure that:

- there is confidentiality about the details of all orders and requisitions;
- all providers and potential providers are treated equally and without prejudice; and
- Each member will disclose details of any private or business interest which she/he, or any close family member, partner or associate may have in any proposed procurement or disposal process, or in any award or contract, and that she/he will immediately withdraw from participating in any manner whatsoever should this be the case.

(ii) LTSM Procurement Plan

All Section 21.1.c schools must develop and implement an LTSM Procurement Plan. This must take cognisance of the requirements as set out by the relevant provincial department of education when purchasing LTSM from service providers.

(iii) Ordering

- During the selection process, the LTSM Committee chooses supplementary LTSM in line with guidance from subject specialists, and curriculum advisers.
- Schools should complete requisition forms for stationery and other essential LTSM which includes equipment, apparatus, consumables etc.
- Schools are required to use their LTSM allocation to purchase LTSM and schools must follow all approved departmental guidelines and procedures when procuring LTSM.

(iv) Receiving

- On delivery, before the invoices are certified as correct, the items delivered must be checked against the items listed on the requisition form to ensure that only items that were ordered are delivered.
- One of the official signatories who have the authority to receive LTSM, must check, sign the invoice and file a copy of the delivery note.

(v) Recording and safe keeping.

- When LTSM is delivered to the school, titles and quantities must be entered into the school's textbook inventory.
- The books must be stamped and given a unique number.
- All LTSM must be kept safely in a storeroom whilst not in use.
- The DBE /provincial education departments have the right to visit schools at random to check if materials have been delivered according to specification and that they are recorded safely stored and effectively utilised.

7.8.3. Procurement of core and supplementary e-LTSM or digital resources for all public schools

Provinces/schools may procure the approved titles as e-books. Licencing of the copyright for use of the e-books may vary from 1-3 years. Depending on the digital format of the material, the DBE and material developers must develop a procurement, delivery and utilisation model with regards to the provision of e-books.

8. LTSM Retention and retrieval

Retaining textbooks in the school system for the stipulated minimum period of five years requires the effective annual retrieval and maintenance of books. While workbooks are renewed annually, complementary LTSM such as reference works should have a minimum lifespan of more than five years. To achieve effective textbook retention each school must develop and implement a Textbook Retention Plan, which must include the following elements:

- Recording in the school's textbook inventory; and
- When LTSM is delivered to the school, titles and quantities must be entered into the school's textbook Register. All books must be stamped with a school stamp in three places, on the cover page, page 100 and on the last page.
- On the title page books should be stamped with the following:

Name of School:				
No	Book number	Name of Learner	Grade	Condition of book 1-5 5- excellent and 1 poor
1	63			
2	64			
3	65			
4				
5				
6				
7				
8				
9				
10				

- This page is to be filled in by the teacher at the start of each year and the book numbers are to be recorded. It is important to control the registry.
- All textbooks are to be covered with a strong plastic and tape to protect the book.

(i) Issuing of LTSM

- At the beginning of the school year, learners must sign for each book issued to them on a list against each book's number.
- Each learner must have a booklist that must be signed by the learner and parent/guardian.
- A parent/guardian must sign an undertaking to replace lost or damaged books.
- Signed booklists must be kept in the schools safe by the LTSM Committee.

(ii) Inventory checks

- The school must conduct an inventory check by holding a textbook check day at least once per term to check for missing and worn-out books against the list.
- In the case of missing books, parents must be informed and asked to replace them or pay their replacement value. Book accounts must be sent to parents.

(iii) LTSM audit

- The school principal must conduct an audit of all LTSM at least once per year.
- The results of stock-taking must be able to identify the shortfalls for the following year.
- Records of lost and worn out texts must be kept.

(iv) Retrieval

- At the end of the school year, books must be handed back to the subject/class teacher on a specified day.
- The teacher must check each book against the book's number and the learner's name.
- Alternatively, the textbook committee could collect textbooks that learners return to the book room, using the booklists.

(v) Record keeping and reporting

- A school textbook inventory must be used to keep a record of books that are lost, paid for and replaced.
- The inventory must be updated at the end of the year to reflect books lost, books replaced, books purchased, books written off as damaged or obsolete, and stock on hand.
- After the completion of the textbook stocktake, the LTSM Committee must report to the principal on the number of books issued and the number

returned for each title. The overall percentage of books returned must be calculated.

- The report must conclude with recommendations on how to increase the percentage of books returned in the following year.

(vi) Disposal process

- A process must be in place in order to dispose of all damaged/obsolete LTSM.
- The LTSM Committee of the school must enter all damaged and obsolete items into a disposal Register.
- Once authorised by a designated authority, the disposal process can be followed.

(vii) Reporting

By the end of the school year, schools must report to the District on the percentage of textbook retention for the current academic year, citing reasons for the non-return of textbooks and plans to retrieve outstanding textbooks and improve textbook retention in the following year.

(viii) Monitoring

- The District/Circuit Official will be responsible for ensuring that the schools establish a Textbook Retention Plan and implement it effectively.
- In addition, they must undertake periodical checks on LTSM to ensure effective use and safekeeping.
- The provincial LTSM official must be responsible for confirming that effective monitoring of LTSM management and annual stock-taking is done at school level.

(ix) Incentives

- Schools that are demonstrating high retention rate every year may be incentivised by the province. These incentives can be in a form of allowing schools to utilise 10% of the LTSM funds for other educational purposes. The percentage could be increased as these schools are maintaining exceptional record of retrieving textbooks.

9. Monitoring, supporting, reporting and evaluation

(i) Monitoring, supporting and evaluation in textbooks

Monitoring and evaluation should follow a bottom up approach, from school-level to the DBE.

Schools must produce an LTSM report on procurement and retention, which must be consolidated at a district and provincial level.

Consolidated reports must be provided to the DBE in order to inform policy decisions, national planning and to develop a national overview of LTSM coverage and utilisation.

(ii) Key elements for monitoring are: textbook coverage, usage of LTSM, retention rates, durability, and forecasting future demand.