# Action Planning Matrix

## Starting up action planning for early grade reading

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## 1. About this document

- This document will guide your country team through the action planning discussion component by component. Each day of the workshop several thematic areas are discussed. Each discussion will be preceded by a set of technical presentations on the components.

- **This document provides the following:**
  
  a. Planning Matrix of the action steps by component
  
  b. Guidance for discussing detailed steps under each component: The guiding questions in the matrix and supplementary questions are designed to encourage discussion to identify actions addressing possible challenges and help link the action plan with the current situation, challenges, existing initiatives and frameworks.

- **It is envisioned that the action planning kick starts a country-level dialogue** that will translate into actions to improve current or launch new national initiatives and programs and builds new momentum for early grade reading in each country.

- **The action plan for each country will be a living document.** It is not expected that at the end of the workshop the country will have a true action plan, as a real plan needs to be crafted in a more participatory way, in-country, after the workshop. The country team consists of committed key stakeholders nominated through the Local Education Group to participate in the workshop. But the circle of national and international partners might at the country level translate the efforts of your country team to a detailed actionable plan. Possible partners extend to national education institutions, possibly publishers for reading books, decentralized/ sub-regional authorities, schools, inspectors, the Ministry of Finance, Ministry of Planning, etc.

## 2. General guiding questions for the action planning exercise

**These are general issues to keep in mind as you get set to plan your actions.**

a. **Pilot initiatives:** Do pilot experiences on aspects of early grade reading in any of the areas already exist? If yes, is the task to scale it up? If no pilot project has been planned yet, has it been considered? Who in the country is championing/ leading this discussion? In which area of the Ministry of Education (MoE) is it planned? If there are pilot projects and/ or scale-up efforts how do they relate to current plan and country absorptive capacity/ interest?
b. Development partner assistance: Do education development partners (in-country, regional or home offices) already provide on-site assistance on early-grade reading, of a very high quality and experience, accessible for the Ministry of Education, national education institutions and/or local NGOs? Is this already in place, can it be accessed or is there a plan to mobilize it?

c. Target grades: What grades have been or will initially be targeted in your country through this action plan?

d. Linkage to education sector plan: How can you best link and base action planning to the existing sector plan and strengthen the education quality components in the plan?

e. Cross-cutting issues: We encourage you to include in your discussion issues that relate to particular challenges to remote areas (e.g. deployment of qualified teachers), marginalized children (e.g. regarding access and incentives), available capacity to effectively implement and monitor the actions, and aspects of girls’ education.

f. Capacity gaps: What are the existing gaps and barriers? Has a capacity gaps assessment been conducted for the sector? What will likely be the major challenges (national, school level, …)?

g. Initial consensus: Country teams are encouraged to seek initial consensus around the action plan’s ideas and the plan itself: First, to identify champions to move the action agenda on early grade reading forward and second, to identify implementation leaders in the different areas concerned.

3. How to work with the Action Planning Matrix

- **Action plan work is cumulative over the components.** In thinking through a component that comes later in the workshop, you will often realize that there is something you need to alter in a previous component. (For example, thinking about teacher training processes may lead you to go back over the design of lesson plans.) Please keep in mind to make changes in earlier components if needed.

- **Level of detail:** We encourage you to examine each component with the goal to sketch out activities to a point that they could be implemented (implementation-ready level of detail) and relate to a specific deliverable. This can go as far as to come up with quantitative targets. Also think of possible milestones to achieve over time to achieve the end target. All that keeping in mind those targets should be realistic, implementable and effective, and fundable. Note that for many of the questions the initial answers are to be fleshed out after the workshop with your in-country partners. We need to know your approach for finishing the plan but we also need to know your ideas for the technical content of the plan as far as you can do it right now.

- **Working with the Matrix:**
  - Note that in each “substantive” area, there are two kinds of actions: The first two actions have to do with decisions to be taken back home to firm up who is in charge and how you will continue to develop the plan. You may not have the authority to decide that right now. If you feel you have the authority to at least make suggestions, do so. If not, we realize it will have to be firmed up after the workshop. The second are substantive decisions. On those, we definitely want your opinion now, even if things may change later based on the decision-makers’ lead and local discussions.
  - Note that some cells may be NA: Not Applicable. These say “NA.”
  - As you work, expand the rows/columns of the matrix, if needed, so as to be able to make notes, electronically, in the “Initial Answers” area.
  - Refer to technical presentations for guidance.
  - In all cases take prior experience into account from your own country. Also source ideas and priorities from the presentations.
### 4. Action Planning Matrix

After leaving this workshop, the first step will be to flesh out the action plan you have developed here into a more complete and real action plan.

<table>
<thead>
<tr>
<th>Action</th>
<th>Guiding questions</th>
<th>Initial answers [to be filled in by your country team]</th>
<th>Deadline to take action or decision</th>
<th>Which partners will play what role?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) a) Overall lead</td>
<td>Who will take the lead?</td>
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<tr>
<td>1) b) What is the fit with current education sector plan?</td>
<td>Does the current education sector plan contain a logical place to anchor an early-grade reading action plan? If not, how will you build one?</td>
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<tr>
<td>1) c) Previous Experience</td>
<td>What pilots, previous experiences exist? How will lessons be used in developing an action plan?</td>
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<tr>
<td>1) d)</td>
<td>What grades will the reading effort target? At first? In the medium term?</td>
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<tr>
<td>1) e) Goal-setting</td>
<td>What numerical goals will you set?</td>
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</table>
## 2) Generating initial consensus around the plan

After the plan has been developed, it is still necessary to market it and develop consensus, even if it was even if it was developed participatorily.

<table>
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<tr>
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<tbody>
<tr>
<td>2) a)</td>
<td>Determine leadership</td>
<td>Who takes the lead?</td>
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<tr>
<td>2) b)</td>
<td>Determine interest groups and approach to each</td>
<td>Who needs to be consulted? Which groups will likely be in favor? Which groups might be hesitant?</td>
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</table>
### 3) Social Marketing and Communications

After the plan is under implementation, what social communications approaches will be used?

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<thead>
<tr>
<th>Action</th>
<th>Guiding questions</th>
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</thead>
<tbody>
<tr>
<td>3) a) Overall lead</td>
<td>Determine who will be in charge, and who will support</td>
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<tr>
<td>3) b) Expertise (3)</td>
<td>What social marketing expertise exists in country? If not enough, where will you get it?</td>
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</tbody>
</table>
| 3) c) Plans at school level (2) | How will you create demand for reading by communities/parents?  
What role will schools play in communicating results to communities?  
What activities will be used to inform/invoke communities in reading efforts? (Compare to what was presented.) | | | |
| 3) d) Plans at national level (1) | How will you create demand for reading?  
What is the plan for communicating implementation strategy?  
What is the plan for communicating successes? National? Any other level? | | | |
4) **CURRICULUM AND LESSON PLANS**

What will be the approach to teaching reading, and who will develop lesson plans? What lesson plans exist and are they as explicit as the ones demonstrated, if not, how will they be improved?

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>4) a) Overall /lead</td>
<td>Determine who will be in charge, who else will collaborate. (Decision deadline only.)</td>
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<tr>
<td>4) b) Advice</td>
<td>Who will be the source of technical advice on curriculum and lesson plans?</td>
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</table>
| 4) c) Standards | Are there appropriate reading standards?  
As clear as the ones discussed in presentations?  
Do teachers and parents know them?  
If not how will you create them?  
How will you communicate them? | | | |
| 4) d) Explicitness | Are there standard lesson plans for teachers?  
As direct and explicit as those discussed in presentations?  
If not, how will you develop and communicate them? | | | |
| 4) e) Curricular space | Is reading an explicit subject in the curriculum/syllabus?  
If not, what will you do about this?  
How much time is devoted? As much as presentations suggest?  
If not, what will you do?  
What opportunities and time are created for out-of-school reading? | | | |
5) **Teacher training and support**

Methods for ensuring support to teachers in using better methods and materials.

<table>
<thead>
<tr>
<th>Action</th>
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</tr>
</thead>
<tbody>
<tr>
<td>5) a) Overall lead</td>
<td>Determine who will be in charge, who else will collaborate. (Decision deadline only.)</td>
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<tr>
<td>5) b) Advice</td>
<td>Who will be the source of technical advice?</td>
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<tr>
<td>5) c) Training model</td>
<td>How in-depth is the training of teachers? Of coaches? How long initially? How long each in-class visit? How many, how often? How deep is the cascade? If more than 2 steps, what will you do? Is training as good as in the presentations? If not, what will you do to improve? How do you train teacher support personnel or coaches? As well as in the presentations? If not, how will you improve?</td>
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<tr>
<td>5) d) Teacher organizations</td>
<td>What role for teacher organizations? Who will get them involved?</td>
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<tr>
<td>5) e) Technology</td>
<td>What appropriate, inexpensive, sustainable technology might you use, to increase pace of training without losing fidelity?</td>
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</table>
### 6) Mother tongue instruction

Determine degree and types of L1 instruction in reading and approach

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<tr>
<th>Action</th>
<th>Guiding questions</th>
<th>Initial answers [to be filled in by your country team]</th>
<th>Deadline to take action or decision</th>
<th>Which partners will play what role?</th>
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<tbody>
<tr>
<td>6) a)</td>
<td>Overall lead</td>
<td>Who takes the lead here?</td>
<td></td>
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<tr>
<td>6) b)</td>
<td>Advice</td>
<td>Who will be the source of technical advice, and how do we know it is good?</td>
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</tbody>
</table>
| 6) c)  | Lesson plans and curricular approach in L1 | Who will be the source of local expertise on linguistic issues?  
Who will help adapt scope and sequence, lesson plans and learning materials? |
| 6) d)  | Reading materials in L1 | Do you have enough appropriate materials for L1?  
As good as in the presentations?  
Economical?  
If not, how will you develop AND deploy them? Finance? |
| 6) e)  | Language Policy   | What is currently language policy in reading?  
In theory? And in reality?  
What is the language transition model, and is it as well applied as in the presentations? If not, what will you do?  
What needs to be done to build more consensus if policy not clear or appropriate?  
What is the approach in multi-language settings? (Refer to presentation). How can it be improved? |
| 6) f)  | Deployment        | Are language issues considered in teacher deployment?  
If not, how can this be change? |                                    |                                   |
<table>
<thead>
<tr>
<th>7) LANGUAGE TRANSITION</th>
<th>Determine if, when, and how children transition into L2</th>
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</thead>
<tbody>
<tr>
<td><strong>Action</strong></td>
<td><strong>Guiding questions</strong></td>
</tr>
<tr>
<td><strong>7) a) Overall champion/lead</strong></td>
<td>Determine who will be in charge, and who else will collaborate.</td>
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<tr>
<td><strong>7) b) Advice</strong></td>
<td>Who will be the source of technical advice?</td>
</tr>
<tr>
<td><strong>7) c) Technical issues</strong></td>
<td>Which model of transition does your country currently follow? In theory and in practice? Based on the presentation, might this need to change? If so, what kind of change, and how will you generate the change? How will you handle issues pertaining to materials, teaching methodologies, etc., during transition?</td>
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</table>
8) Reading materials

Reading materials need to be tightly linked to the lesson plans and reading approach.

<table>
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<tr>
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<tbody>
<tr>
<td>8) a)</td>
<td>Determine who will be in charge, and who else will collaborate.</td>
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<tr>
<td>Leadership</td>
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<td>8) b)</td>
<td>Who will be the source of technical advice?</td>
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<tr>
<td>Advice</td>
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<tr>
<td>8) c)</td>
<td>Are existing reading textbooks consistent with an explicit reading instruction approach as presented in the session? (For example, if in English, are they &quot;decodable&quot;?) If books are not as good as they ought to be, how will you improve existing books or will you need supplemental materials instead?</td>
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<tr>
<td>Technical approach</td>
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<tr>
<td>8) d)</td>
<td>What extra reading materials are available? School libraries? Books to take home? Are they suitable for a variety of skill level including beginners? Are they available in all relevant L1s and L2s? How many titles are available per grade, per language? Can students take them home? If any of these are a problem, what are you going to do about it?</td>
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<tr>
<td>Technical approach</td>
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</table>
### 9) ASSESSMENT TOOLS

How teachers will assess their student’s progress, how will supervisors/district officers assess progress? How will national level assess progress?

<table>
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<tr>
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<tbody>
<tr>
<td>9) a) Leadership</td>
<td>Determine who will be in charge, and who else will collaborate.</td>
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<tr>
<td>9) b) Advice</td>
<td>Who will be the source of technical advice?</td>
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<tr>
<td>9) c) Technical issues</td>
<td>How is reading currently assessed at the classroom level and at the national level?</td>
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<td></td>
<td>Is it consistent with what is shown in presentations?</td>
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<td></td>
<td>If not, how will you improve assessment for classroom use, district and national tracking?</td>
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<td>What kind of support do teachers need to implement strong assessment?</td>
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<td>How will you provide that support?</td>
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<tr>
<td>9) d) Technical issues</td>
<td>If the reading program is new, how soon after start-up will you measure a mid-line so as to allow correction?</td>
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<td></td>
<td>And thereafter, how often will you measure or assess reading? Sample or universal?</td>
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</table>
## 10) MONITORING AND EVALUATION

### What will the evaluation approach be?

<table>
<thead>
<tr>
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<th>Deadline to take action or decision</th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>10) a) Overall lead</strong></td>
<td>Determine who will be in charge, and who else will collaborate.</td>
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<tr>
<td><strong>10) b) Advice</strong></td>
<td>Who will be the source of technical advice on monitoring and (different) on impact evaluation?</td>
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</tbody>
</table>
| **10) c) Technical issues**    | What will be approach to monitoring and evaluation? Do you need monitoring only or also impact evaluation? Why or why not? (Refer to presentation.)  
In either case, what will be the reading assessment tool used?                                                                                   |                                                        |                                   |                                    |
| **10) d) Link to goals in section 1** | How will exactly will evaluation be used to measure progress towards goals spelled out in section 1 (refer to section 1 of action planning matrix)? How will the goals drive the type of monitoring and evaluation and assessment used? |                                                        |                                   |                                    |
## 11) Logistics and management of the whole approach

### How to bring it all together for delivery?

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>11) a) Overall lead</td>
<td>Who will design the logistics of program? Who will manage the whole program?</td>
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<tr>
<td>11) b) Advice</td>
<td>Who will be the source of technical advice on logistics of the reading approach in the initial stages?</td>
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<tr>
<td>11) c) Basic ratios</td>
<td>What will be the process be for determining how many: 1. Teachers (the ratio of children to teachers, teachers to coaches) and what is your initial estimate of these ratios? 2. Books of all types: how will you determine how many you need?</td>
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<tr>
<td>11) d) Management</td>
<td>How will you manage the process of: 1. Getting the coaches or teacher support people trained? How much training? Refer to presentation. 2. Writing, publishing, distributing new reading materials (e.g., supplemental books if existing ones are not very adequate)? 3. Deployment and management of assessment and M&amp;E. Have you got good models/experience in this area? Evaluated? As good as what was presented? If not, how will you improve the management of these processes?</td>
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<tr>
<td>11) e) Technical issues</td>
<td>Role of technology in the approach. Have you got any models or proposals for use of appropriate, low-cost, sustainable technological improvements for logistics and management?</td>
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</table>
5. Supplementary questions

*These questions are supplementary to those above and help to round out what is meant.*

1) **FLESH OUT THE ACTION PLAN**

- How will you make sure that the eventual plan has all the needed levels of implementation detail?
- Keep in mind the importance of goal setting, state the goals from the outset in terms of % of children decoding, etc.

2) **GENERATING INITIAL CONSENSUS AROUND THE PLAN**

- This concerns developing initial consensus around the implementation of the early grade reading action plan. This is more like social marketing to implementation leaders.
- Who precisely are the implementation leaders within the MoE / outside the MoE? How are they identified?
- What is the political economy of all this?
  - *Who is likely to be opposed?* What are the sources of lethargy and inertia? Are there interest groups who want the children to remain ignorant or simply do not care? Are there interest groups for whom getting children to read means working harder or differently? What needs to be done to generate as much buy-in as possible? How can this be linked to the campaigns/social marketing?
  - *Who is likely to be in favor?* Who are interest groups who are serious about getting the children learning? What organizational obstacles do they face? How can one stimulate and overcome those obstacles? Who are passive observers? What is the balance of power and interests between these groups?

3) **SOCIAL MARKETING AND COMMUNICATIONS IN THE IMPLEMENTATION PROCESS**

- Who is the main source of advice/ background knowledge on social marketing, mobilization and communication to all actors (to schools, from schools to parents, etc.) within your country?
- How will one market the current levels of very low reading as part of the motivational campaign? How to tie it to baseline and other measurements? Ties to measurement issues below, come back here if need be, after considering measurement issues.
- How will the goals and responsibilities and results of the early grade reading drive be communicated? How will the macro level communicate successes and challenges? Who will do it?
- How does one make sure that the campaigning for early grade reading is not purely external?
  - If the main driver for early grade reading is the MoE, how do you plan to bring others along?
  - If the main drive for early grade reading is outside the MoE, who in the MoE will take ownership?
  - What is the likely role and contribution of CSOs?
  - How can you use existing networks of the MoE and civil society to carry out campaigns instead of mounting costly special-purpose but external campaign?
• Note that the reading drive ITSELF may contain elements of social marketing and community involvement, such as community involvement in reading, report cards, etc. If so what is the link between the reading drive at school level and the community marketing or social marketing/social mobilization activities at the national level?

4) CURRICULUM AND LESSON PLANS

• How does one identify the best team in-country (MoE and NGO) to counterpart any outside technical assistance? Who will identify the team? Sketch out either the team or the process for identifying and creating this team.

• Does the approach have a clear basis / link in the current curriculum? If not, can curricular space be created for a pilot? How will time be secured for explicit reading instruction?

• How are you planning to involve schools/teachers who are current positive outliers, i.e., already teaching reading well? How to involve teachers more generally?

• What is the plan/option for moving up the grade structure, if you start with the early grades? And what is the plan/option for shifting curricular content of lessons as you move up the grades?

5) TEACHER TRAINING AND SUPERVISION

• What basic in-service upgrade model is considered? Initial training in groups and then coaching support at school level?

• How to avoid a deep cascade in the necessary training and loss of fidelity? If coaches are only one step between top trainers and teachers how many coaches need to be trained? How much training time do you need from top trainers?

• What should be the frequency of coaching visits? At first, and then later? What are the costs involved (time, transport, lodging).

• Please discuss the development of coaching protocols, checklists and work schedules: How simple and time delivery effective should these be?

• Please discuss transport and logistics issues: What are the options to have locally based coaches integrated in the public system? What are the pros and cons of starting out NGO-based? Or based within the MoE but in “special campaign mode” versus using the regular systems? What are the pros and cons and what does the country action planning team recommend?

• Create opportunities for coaches to learn from each other and their trainers.

• What is the role of school heads? Do they need to be trained? Trained differently? How so?

• What is the number of teachers related to number of grades initially targeted?

• Coordination role of lower-than-national levels (if scale-up).

• What roles do NGOs/CSOs and teacher unions’ professional development wings play in this field?
6) **Mother Tongue Instruction**

- Is the overall program L1 or L2? If L2 mostly, what considerations need to be made when linking basic approach to L1? Start lesson plan design with L2 and adapt? Or just start right off with L2s? Start with one L1 to develop model then adapt?

- How will/ do you access and identify expertise for each language in order to create lesson plans and reading materials?

- What is the process to develop within the MoE the scope and sequences for teaching reading in each language? Sketch out the process. Who will do it?

- How to commission / set up working groups for each language that include (a) language experts, (b) teachers with experience or at least knowledge of those languages and some curricula development experience, and (c) teachers with expertise in teaching READING in those languages? How can these working groups be set up to ensure links between the lesson plans, the teaching approaches and the materials?

- How to set up the "rules" (the linguistic or pedagogical rules, such as what letters and letter combinations to start with) of development of the lesson plans and materials in the various languages?

- What are the ways to break down the early reading process in decoding and reading with comprehension?

- Consider a quick pilot and try out in real classrooms of lesson plans before starting pilot or scaling.

7) **Language Transition Issues**

- Timing of transition from one language to another. Consider recent research and reports.

- See question in Action Planning Matrix 4) a-d)

8) **Reading Materials**

- How does one identify the best internal team (MoE and NGO) to work on this issue? Is it already obvious? Does one need to have an explicit process for identifying them? What is that process? Sketch out either the team or the process for identifying and creating the team.

- *If enough materials exist,* are there supplementary materials needed? (i.e., materials that might line up better with the lesson plans or are more explicit and simpler?) If so, how will they be a) written, b) published, c) printed, d) distributed. *If no materials exist,* what are the plans for: a) writing, so that they line up with lesson plans and teaching approach, b) publishing, c) printing, d) distributing. *If new materials need to be developed,* consider tradeoff of cost vs superficial quality (color, etc.) in deciding what to do. In either case, how will options be explored for reducing the cost, increasing the quality, increasing value for money, lowering the cost of distribution, increasing transparency and reducing corruption?

- What special considerations need to be given to developing reading materials in L1?

- Numbers of materials will depend on number of grades targeted.

- How to make allowances for % lost or destroyed? What are the replacement ratios?

- This should include ALL materials necessary to teach reading such as pocket charts, other aids.
9) **ASSESSMENT TOOLS AND COUNTING**

- Development, administration, and links between these types of assessment:
  - Tools for teachers/schools/coaches or district officers to assess
- Plan for informal assessing in real time and transmitting information up to leadership.
- Plan for formal assessing baseline, mid-term, end-of-pilot, or formal assessment on ongoing basis if already a scaled-up effort.

10) **IMPACT EVALUATION**

- See questions in Action Planning Matrix 10) a-e)

11) **LOGISTICS AND MANAGEMENT**

*These issues also are linked to logistical and management issues related to areas above.*

- Issues here pertain to calculating numbers needed and coordination and sequencing, distribution, control.
- Take into account whether pilot versus scale-up versions.
- Think, and re-think production links for materials: conceptualization or intellectual production of materials or training services, physical production or printing, distribution, etc.
- Linkages or permissions so that (a) teacher lesson plans, or curricular adaptations to depart temporarily *(if pilot)* or improve permanently *(if scale-up)*, (b) forms of assessment and reporting, (c) time allotment for lessons, and (d) training/support of teachers all fit into a logistical framework.
- Think about the number of teams needed, links between the teams (or whether just one team with all functions, per school), and the logistics of training for each team: training teams; monitoring teams; data teams; assessment/curriculum/material team; and media/communication team.
- Work out the teacher support and supervision protocol, logistics and transport of supervisors’ distribution, use of own-transport, and hires.
- Take into consideration the use of SMS and other technologies for coordination and planning. Consider any role of technology in all this, including possibilities of electronic assessment or feedback, use of mobiles for management and logistics control.
- Think about the role of sub-national districts or offices in planning and logistics, whether NGO partners or government authorities.
- Calculate number of coaches to be trained. Link this discussion to above (see 5)) discussion on how deep cascades can be before fidelity is lost.
- Use numbers of teachers to drive teacher-based materials estimates (pocket charts, lesson plans, etc.).
- Use numbers of children (including grades targeted) for materials distribution calculations (texts, reading books, and any other stationery).
- Link assessment logistics to type of assessment (see 9)).
Consider in your action planning assessment forms, numbers, printing/production distribution logistics of assessors and their supervisors, packaging of teams and distribution to schools, logistics within the schools. Relationship and economies if assessors are coaches.

Logistics of community animation/accountability/mobilization campaigns (conceptual link to issue of mobilization, above-type of campaigns used will affect logistics to be considered).