

# Final Report

Room to Read's REACH Project in South Africa

August 2019



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# Executive Summary



The Results in Education for All Children (REACH) Project, funded by the Results in Education for All Children trust fund at the World Bank and the Global Book Alliance, aimed to strengthen the South African publishing industry by 1) raising awareness of the critical need for storybooks to create a habit of reading in children, and 2) increasing the supply of quality storybooks in African languages.

**To raise awareness of the critical need for storybooks**, the project focused on establishing a diverse, nation-wide public-private partnership. For the first time at a national level, key literacy experts from across South Africa convened to discuss reading for pleasure. The public-private partnership – comprised of national and provincial government officials from various departments, publishing representatives, academic institutions, and NGOs – collaborated to develop the *What Makes a Great Storybook?* resource. The knowledge that lived separately with each literacy expert was consolidated into one resource for all South Africans to use.

The resource was shared with the public-private partnership and distributed throughout each member's network. *What Makes a Great Storybook?* is available online<sup>1</sup>, along with another resource created through the project, *What Makes a Great Translation?*. The resource provides strong support for those who develop storybooks, as well as those who select storybooks – such as provincial officials who purchase library books. While many of the guidelines could be applied throughout the world, the focus of *What Makes a Great Storybook?* is particularly on what makes a great storybook for South African children. With this collectively created resource, South Africans now have a single standard through which to develop, identify and demand high-quality storybooks for libraries and homes to ensure children have engaging material to read.

The project also involved the public and the government in printing storybook copies to increase interest in providing children with quality books. Through the pooled procurement and open licensing models, the project distributed a total of 101,820 copies of REACH storybooks to children in South Africa, of which more than 55,000 were funded by the South African public and the Mpumalanga government. Book checkout data show that students who received the REACH storybooks from Room to Read are reading the books, and that on average, students of each library checked out a REACH storybook more than 300 times during the month, or slightly over ten times per day. As demand for storybooks in South Africa grows, the public can continue using the REACH storybooks. While materials without a Creative Commons license cannot be publicly used without the creator's explicit permission, the project assigned the storybooks with a Creative Commons license (CC-BY) allowing anyone to freely access and use the storybooks for their needs.<sup>2</sup>

<sup>1</sup>The project's recommendations documents can be found on Room to Read's website: What Makes a Great Storybook - <https://www.roomtoread.org/media/985795/reach-what-makes-a-great-storybook.pdf>

What Makes a Great Translation - <https://www.roomtoread.org/media/985794/reach-what-makes-a-great-translation.pdf>

<sup>2</sup>The design files for the storybooks can be accessed at <http://onedayonebook.org/>

**To increase the supply of quality storybooks in African languages,** the project focused on building the capacity of local publishers and writers who are deeply embedded in the communities of the REACH Project target languages. While the majority of these book creators had little-to-no experience publishing children's storybooks, all had an immense passion for providing children with engaging, quality reading material in their home languages.

The REACH Project selected five publishers and 20 writers for technical capacity building, and also partnered with Electric Book Works, African Storybook, and numerous illustrators, editors, and designers to develop the project storybooks. Room to Read and this team of creators published 20 original storybooks with 100 versions for a total of 120 storybooks in isiZulu, Tshivenda, siSwati, Xitsonga, Sepedi, and English. Publishers and writers benefitted from numerous trainings, including workshops on how to write quality stories, workshops on how to multiply existing stories into more languages with quality, and a 12-hour event to develop a storybook from start to finish called One Day One Book. They deepened their knowledge of Creative Commons licensing through the project's partnership with Neil Butcher & Associates, top experts in the open licensing field.

The REACH Project further engaged publishers to explore new business models, aiming to pilot how publishing African-language storybooks can be profitable and thus inspiring them to supply more books. One approach the project explored was the pooled procurement model which involves pooling print orders from multiple stakeholders together to achieve lower unit costs for everyone. While the Publishers' Association of South Africa (PASA) reported that in 2018, only approximately 10% of publisher profit came from African-language book sales (Figure 5), the REACH pooled procurement model generated 47% of its profit from African-language storybooks. Further, by pooling orders together, publishers and customers secured a 40% reduction in their unit cost compared to if they had printed independently, while Room to Read also saw a 6% reduction (Table 3). Experimenting with the pooled procurement model demonstrated to publishers that if they continue to supply quality African-language storybooks, costs can diminish while demand and profit can increase.

The project used a Results Based Financing (RBF) model to incentivize publishers and writers to produce their work on time and with quality. Further, RBF motivated publishers and writers to maintain a high-level of engagement throughout the project. By paying publishers and writers only after their work was approved, this model guaranteed Room to Read the opportunity to review work, request revisions, and ensure quality before payments were made. As a result of the RBF model, all writers and publishers completed their work on time and with quality. All writers and four of five publishers stayed engaged throughout the project participating in all capacity building opportunities – necessary to ensure the writers

and publishers developed the skills to continue supplying quality storybooks to South Africa after the project close.

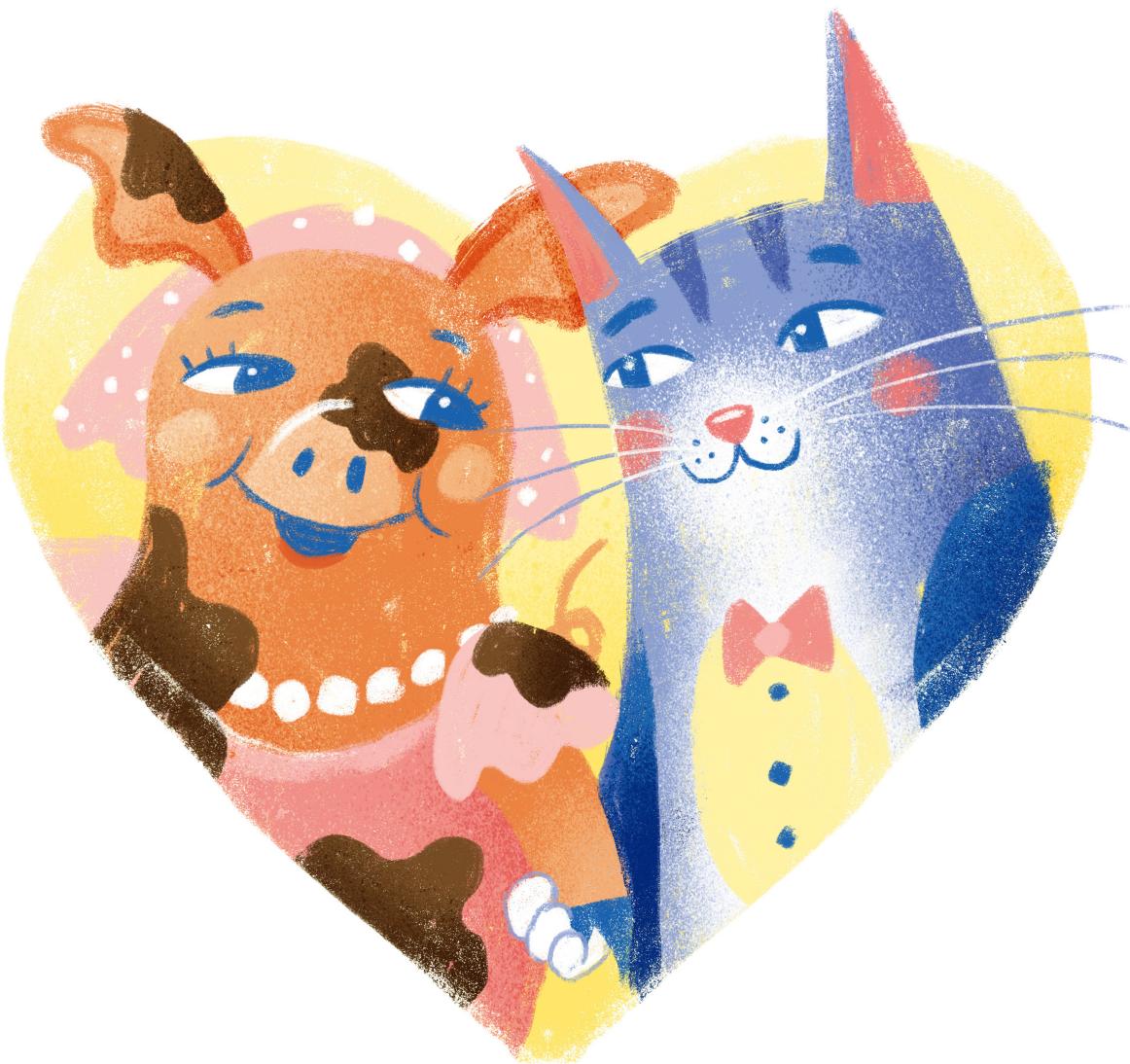
A final component of RBF for publishers was a profit incentive: If publishers participated in pooled procurement and were able to increase customer orders to generate profit, then the profit would be distributed evenly among publishers. The final four publishers participated in pooled procurement, increased order numbers, and received their final payment after pooled procurement concluded.

Through the project, Room to Read learned valuable lessons about RBF including the need to assess who the project partners are and adapt the model as needed. For example, if the project wanted to prioritize working with local, community partners such as African-language publishers rather than larger, well-resourced publishers who publish in English and Afrikaans, then the project needed to provide some budget upfront to fund operational costs. After adjusting the initial design, the project was able to execute the RBF model while partnering with African-language publishers. Motivated by RBF, writers and publishers supplied 120 storybooks to the South African market, increased book distribution, and strengthened their capacity to develop quality storybooks.

Further, Room to Read was paid by the World Bank based on the successful completion of key deliverables, rather than on financial and narrative reporting. Over the course of the project's two years, this payment model allowed Room to Read staff to spend an estimate of 368 hours more focused on project implementation rather than on formal reporting, which consequently redirected approximately USD 10,000 - or 5% of the total budget - of personnel budget to fund project activities.

Through this dual approach of increasing demand through creating awareness of the importance of storybooks and of increasing supply by building publisher and writer capacity, the REACH Project equipped and motivated publishers, writers and others to grow the African-language publishing industry in South Africa. Early activities by the project partners (even before the end of the project) indicate significant success in this area. One partner publisher, Limpopo Faces, reported that after the capacity building trainings, they took the storybook design files, deconstructed them and reconstructed them to get additional practice. Since then, Limpopo Faces applied the learnings gained from the REACH Project and has begun publishing 25 additional storybooks. A number of the isiZulu writers have submitted new stories for national publications, as their experience on the project gave them the skills and confidence to produce more work. Lastly, Abantwana Publishers seized the entrepreneurial spirit that open license-based business models can offer. Since learning about Creative Commons license and pooled procurement through the REACH Project, Abantwana has already leveraged their new understanding to grow their publishing program through innovative collaborations with other project publishers.

# Background



The REACH Project in South Africa was designed to address South Africa's two significant challenges in providing storybooks for young readers. First, the book supply chain fails to provide adequate quantity and quality of early-grade storybooks in languages other than English and Afrikaans. Limited government budgets and complex procurement systems make it difficult for committed government officials to purchase enough of the right books at the right time for schools. The same procurement systems inhibit commercial publishers from broadening the languages in which they publish. Second, the current supply chain emphasizes formal classroom material (textbooks and readers) over books for enjoyment. Reading for pleasure is widely cited as key to developing lifelong readers and educated adults. Yet, when curricular ties and tightly leveled text become the focus of development, high-interest storylines and high-quality illustrations often suffer. Many publishers could also benefit from additional capacity building to further understand and be able to develop imaginative stories, where the text and illustrations work seamlessly together.

The South African Book Development Council reported that an alarming 58% of South African adults live in a household with zero books and only 14% actively read for pleasure<sup>3</sup> – likely a result of the lack of high-quality reading-for-pleasure books in African languages.

The REACH Project came at an important time in the development of the South African government's thinking about reading and the resources required for schools. The South African government launched the Read to Lead Campaign (2015-2019) aiming to create a nation of readers but needed more resources to support their Campaign. In Room to Read's discussions with provincial officials responsible for library book purchases, they all cited the unavailability of storybooks as one of the central reasons that children are not reading for pleasure — and often, that children are not reading at all.

Room to Read was uniquely positioned to lead the development of reading-for-pleasure books in South Africa, given extensive organizational experience in collaborating with governments and in publishing engaging and relevant storybooks in underserved South African languages, and in other languages throughout the world. Through the REACH Project, Room to Read could respond to the gap in quality storybooks on the market, address the critical need for an increased focus on reading material in African languages, and clarify the important distinction between storybooks and readers – all of which are essential to facilitate a sustained habit of reading in South African children. Further, these efforts are essential to inform policy decisions about the types of books needed to transform the lives of children.

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<sup>3</sup>"National survey into the reading and book behavior of adult South Africans 2016," TNS, and South African Book Development Council, 2016. <http://www.sabookcouncil.co.za/wp-content/uploads/Final-Report-NRS-2016.pdf>

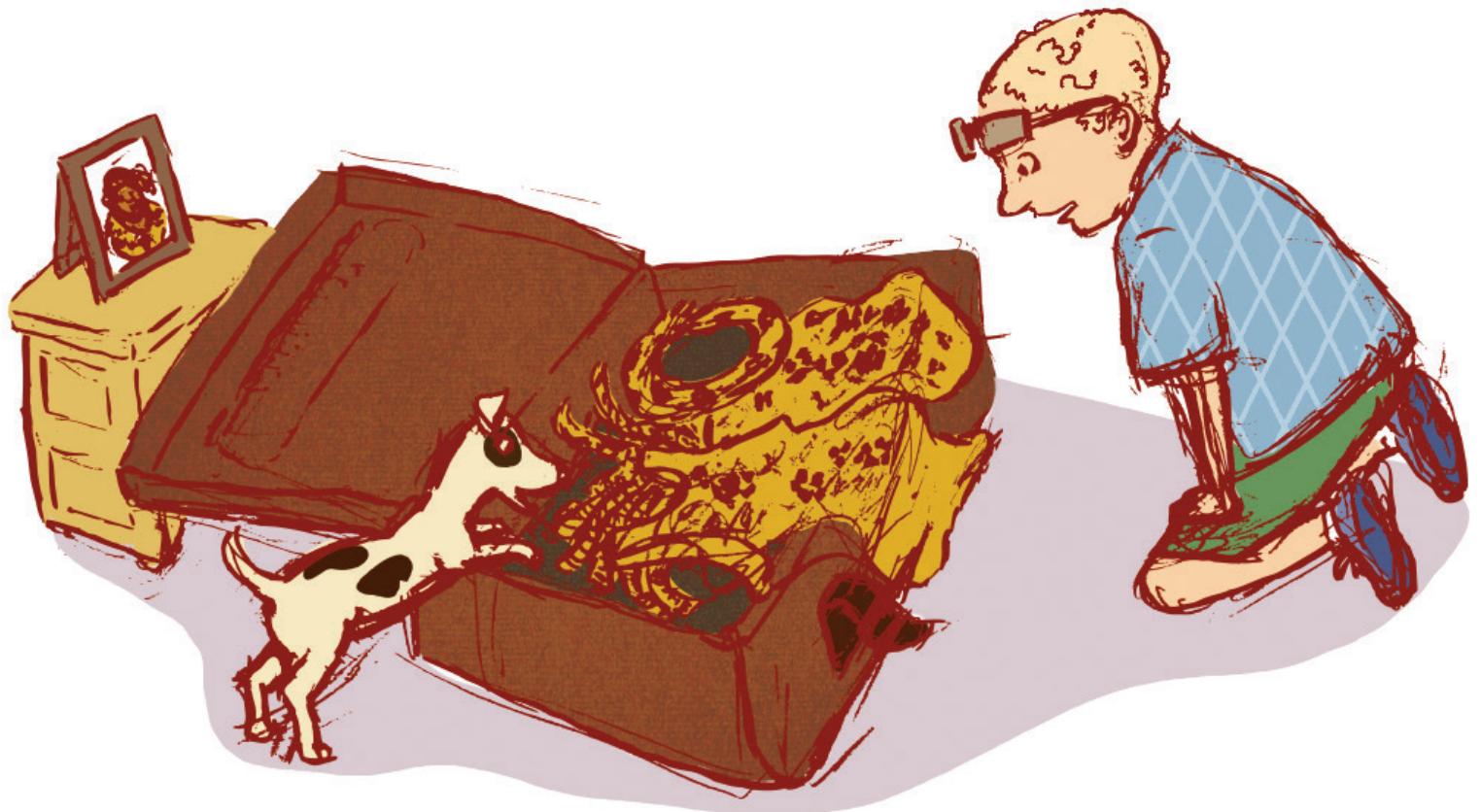
Room to Read also considered how the project would support the five pillars of the African Publishing Collaboration, established by the Association for the Development of Education in Africa and the Global Book Alliance. The REACH Project includes activities that support all five of the pillars: Advocacy, Policy Dialogue, and Reading Promotion; Training & Research; Bookselling & Distribution; Publishing Partnerships; and Local Languages (*Figure 1*) - thus providing a true pilot of the critical work imagined by the African Publishing Collaboration.

*Figure 1 - African Publishing Collaboration Pillars*



*Abidjan : January 2018*

# What was the Activity?



The REACH Project was a two-year activity, funded by the Results in Education for All Children trust fund at the World Bank and the Global Book Alliance, designed to increase the supply of quality storybooks in African languages in South Africa as well as raise awareness of the critical need for storybooks to create a habit of reading in children. To achieve these goals, the project aimed to:

1. Create a South African public-private partnership to develop national storybook guidelines. These guidelines would recommend how to develop engaging stories and illustrations, as well as how to select quality storybooks from the market;
2. Publish engaging, quality, relevant storybooks in African languages spoken by children from underserved communities or populations. Through the process of publishing the storybooks, the project would strengthen the capacity of publishers and other book creators to develop quality storybooks in African languages; and
3. Distribute copies of the REACH storybooks to children in government schools in South Africa. Further, the project would make the REACH storybooks available to the public through open licensing as well as creating a pooled procurement system through which the public, other NGOs, and the government can order copies of the REACH books.

Each step of the project pivoted on the completion of specific milestones intended to benefit the South African government and children in Limpopo, Mpumalanga, and KwaZulu-Natal and launch a critical change in the children's storybook publishing industry in South Africa. The project sought to develop the standards and funding mechanisms to begin creating demand from the government for better content, while improving the kinds of books that publishers can create and sell.

This project sought to leverage a partnership between the established publishing industry in South Africa and the Department of Education by increasing government promotion of the storybooks they believe are necessary for children to become independent readers. Through this working partnership, the government would look to publishers to develop the needed resources and get them into the hands of children. The creation of the national guidelines for storybooks would offer publishers more clearly defined standards to expand the development and printing of early-grade books—as well as a mechanism through which to support underserved language co-editions. Furthermore, this project would build an awareness of the books and actively engage provincial governments and publishers to facilitate affordable sales. The Department of Education, with its Read to Lead Campaign, was looking for partners with the expertise to design and implement an intervention that will

reach as many children as possible with the highest quality books. Room to Read was already an implementing partner of the campaign under a formal Memorandum of Understanding with the Department of Education.

Thus, with the REACH grant, Room to Read created and led this National Public-Private Storybook Development Initiative, consisting of four steps over 24 months:

#### **Step 1: August 2017 - February 2018**

Creation of a national public-private working group to establish best-practice recommendations for early-grade storybooks.

#### **Step 2: March 2018 - June 2018**

Provide technical assistance and capacity building to 5 publishers and 20 writers for the creation of early-grade storybooks (20 original titles in 6 languages: isiZulu, Tshivenda, siSwati, Xitsonga, Sepedi, as well as English), resulting in 120 storybooks. Build knowledge of publishers, writers, illustrators, designers and editors in the book development process and in publishing African languages.

#### **Step 3: July 2018 - December 2019**

Pilot pooled procurement model to make storybooks available to the public for purchasing. Print titles for pooled procurement customers and South African government schools in Mpumalanga, KwaZulu-Natal, and Limpopo provinces.

#### **Step 4: January 2019 - August 2019**

Distribute 100,000 copies of the storybooks to government schools and pooled procurement customers. Analyze number of copies available, library checkout, and title recognition data.

# Why was it Chosen?



This project was chosen because Room to Read and the REACH trust fund believe that the above activity design and successful implementation would lead to 1) an increase of quality storybooks in African languages on the South African market for children, as well as 2) a raised awareness of the critical need for storybooks to create a habit of reading in children.

## THEORY OF CHANGE

If Room to Read can help publishers to provide larger quantities of better storybooks at more affordable prices and if provincial governments and the public prioritize purchasing quality storybooks in African languages for school libraries and homes, then children will read more for enjoyment, reading skills will improve, and broader learning outcomes will arise. Additionally, if Room to Read can increase both demand for and supply of African-language storybooks, African-language publishers in South Africa will have a demonstrable model to follow for sustainable industry growth.

# How did it Work?



## Result Based Financing

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- Results Base Financing was implemented to incentivize publishers and writers to produce work on time and with quality, as well as to participate in all capacity building opportunities. All writers and four of five publishers completed the project successfully, resulting in 120 quality African-language storybooks for children.
  - Room to Read was paid by the World Bank based on key milestones and the delivery of quality work rather than on formal reporting. This approach saved an estimate of 368 hours of staff time, which consequently redirected approximately USD 10,000 - or 5% of the total budget - of personnel budget to fund project activities.
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### The Results Based Financing Model

Results Based Financing (RBF) is a payment structure designed to incentivize implementors to focus on quality outcomes. Rather than a funder issuing payments based on an implementor's spending, reporting or activities, the funder issues payments based on results or upon the successful submission of key deliverables that are expected to lead to quality results. The REACH Project in South Africa incorporated RBF in three ways: 1) through the payment structure of the project funds between the World Bank and Room to Read, 2) through the payment structure between Room to Read and the project's publishing partners, and 3) through the payment structure between Room to Read and the project's storybook writers.

The World Bank and Room to Read designed the REACH payment structure so that the World Bank distributes payments to Room to Read in installments. The World Bank delivers each installment after Room to Read submits a key deliverable and the World Banks reviews and approves the quality of the deliverable. In other words, the payments are based on the successful submission of deliverables that are expected to lead to quality results rather than on implementation expenses.

The payment structure for Room to Read is outlined below:

*Table 1 - Room to Read RBF Payment Structure*

Deliverable	Proportion of Total Payment
Signing of contract	10%
<i>Completion of Deliverable 1 - Final Best Practices Recommendations, developed with public private partnership</i>	40%
<i>Completion of Deliverable 2 – Final storybook manuscripts</i>	40%

<i>Completion of Deliverable 3 - Final storybook printed copies and digital files</i>	5%
<i>Completion of Deliverable 4-6 - Final report, data outputs, and evidence of book delivery to schools</i>	5%
<b>TOTAL</b>	<b>100%</b>

The first payment to Room to Read was not a traditional RBF payment since the funds were issued after the agreement between the World Bank and Room to Read was signed, rather than upon the completion of a key deliverable. This first payment was set up to recognize that oftentimes implementors need an initial payment to pay for activities required to complete the first deliverable. Without this initial payment, implementors must front the cost of activities until they complete the first deliverable.

Room to Read similarly designed the payment structure between Room to Read and the publishers and writers who participated in the REACH Project based on the RBF model. While some book developers (illustrators, designers, editors) participated in REACH for only the development of the 20 original storybooks, publishers and writers were selected for RBF because they were contracted to participate in a larger capacity. The RBF model for publishers and illustrators was designed to incentivize publishers and writers to stay engaged throughout the duration of the REACH Project and to produce the additional 100 storybooks with quality. It was essential that publishers and writers stay engaged to fully benefit from the capacity building support and to continue creating quality storybooks beyond the end of the REACH Project.

For writers, their full scope of work included: 1) attending a writing workshop, 2) attending a book development workshop, 3) attending a versioning (i.e. translating with quality) workshop, 4) writing one original story in their own language, 5) taking four original stories written by other writers and writing new versions in their own language, and 6) copyediting other writers' stories written in their language to ensure quality. Per the RBF model, the payment structure was designed so that Room to Read would pay writers 100% of their writer's fee only after their final work products were approved by Room to Read.

For publishers, their full scope of work included managing the overall process of book development from start to finish. This included activities such as 1) identifying a team of writers who were native speakers of the REACH target languages, 2) attending all capacity building trainings and book development workshops, 3) cascading trainings to their writers, 4) overseeing the development of four original storybooks, 5) supporting writers' versioning work, and 6) participating in pooled procurement. As with the writers' payment structure, this was designed so that Room to Read would pay publishers 100% of their publisher's fee only after all the final books and the pooled procurement activity were complete. Lastly, if any profit was made during the pooled procurement activity, the profit would be equally distributed to publishers at the end of the activity.

# Result Based Financing Results

## Room to Read Payments

The RBF model was successful in saving substantial staff time and prioritizing budget towards implementation when applied to Room to Read payments from the World Bank. As outlined in *Table 2*, Room to Read estimated that RBF saved approximately 46 hours of staff time per quarter on financial and narrative reporting. The estimate was calculated by polling staff who completed quarterly reports for other multi-year literacy projects. Less staff time on reporting resulted in lowered personnel costs. Based on the estimated hours and staff salaries, Room to Read redirect approximately USD 1,267 per quarter from personnel to non-personnel project costs. Over the course of the project's two years, RBF allowed Room to Read staff to spend an estimate of 368 hours more focused on project implementation, which consequently redirected approximately USD 10,000 - or 5% of the total budget - of personnel budget to fund project activities.

*Table 2 - Estimated Time Required for Quarterly Reporting*

Staff	Hours per quarter	Responsibility
South Africa Accounting and Finance Manager	8 hours	<b>Country-level financial report:</b> Prepare, submit, and revise as needed based on feedback
Africa Regional Finance Manager	12 hours	<b>Country-level financial report:</b> Review and provide feedback  <b>Consolidated global financial report:</b> Prepare global-level financial inputs; consolidate country-level and global-level reports; revise consolidated report as needed based on feedback
Global Donor Finance Manager	2 hours	<b>Consolidated global financial report:</b> Review, provide feedback, approve final report
South Africa Literacy Program Manager	2 hours	<b>Narrative report:</b> Provide inputs for technical activity updates
Global Literacy Technical Lead	8 hours	<b>Narrative report:</b> Draft update for all technical activities, including inputs from South Africa Literacy Program Manager.
South Africa Country Director	1 hour	<b>Narrative report:</b> Provide inputs for government and partner engagement updates

Staff	Hours per quarter	Responsibility
South Africa Administration and Procurement Manager	1 hour	<b>Narrative report:</b> Provide inputs administration, procurement, and operational updates.
Project Manager	12 hours	<b>Narrative and consolidated global financial reports:</b> Draft update on all management, operations and procurement, HR, compliance, and government and partner engagement activities for narrative report, incorporating technical write-up provided by Technical Lead and using inputs from various team members. Review and approve financial report.
<b>TOTAL Time per Quarter</b>	<b>46 hours</b>	
<b>TOTAL Cost per Quarter</b>	<b>USD 1,267</b>	

Further, the RBF model gave Room to Read more autonomy to manage finances and added an additional layer of responsibility to manage finances well. Since funding was not dependent on project spending, Room to Read was able to make spending decisions based on what adds value to the project. Generally, if an implementing organization sees an underspend towards the end of the project, there is no incentive to spend more to ensure they receive the full committed funds. If there are savings, the implementor can incorporate any savings back into programs. Similarly, if the implementor spends beyond the budget, the implementor is responsible for funding the additional costs. RBF adds a strong incentive for organizations to focus on what adds value, spend responsibly and work efficiently.

### Writer Payments

The RBF model was also successful when applied to writer payments from Room to Read. Per the original payment plan, Room to Read paid writers after writers delivered their full scope of work. Since writers generally have little to no material costs to develop manuscripts, they do not assume a large financial burden when waiting to be paid until after they submit their final manuscripts. Generally, Room to Read pays writers in full only after they produce their final manuscripts, so the RBF approach in this case was not new to Room to Read, and the writers with whom Room to Read partnered for the REACH Project did not express any concerns about being paid upon final completion of their work. Writers stayed engaged throughout the project until they completed their scope of work, Room to Read received the manuscripts on time, and Room to Read was satisfied with the quality of the work.

## Publisher Payments

Room to Read initially designed the publisher payment schedule so that publishers would be paid 100% upon successful completion of their full scope of work; however, early in the project, Room to Read redesigned the publisher payment schedule. During the launch of the project, the public-private partnership Reference Group recommended to Room to Read that the REACH Project prioritize working with small, African-language-speaking publishers. After selecting the final publishers, Room to Read reviewed the publishers' operating budgets, and since most of the publishers were very small, it was not feasible for publishers to execute on their management responsibilities without receiving payment until the end of the two-year project. Room to Read adjusted the RBF payment schedule to be similar to Room to Read's own payment schedule. Room to Read divided the publisher management fee so that publishers got a "signing payment" upon signing their agreement (90% of total payment) and then a final portion after all their responsibilities were complete (10% of total payment), not including the pooled procurement payment, if the activity generated profit.

Four of the five publishers stayed engaged throughout the project until they completed their scope of work. Room to Read received all deliverables on time, and was satisfied with the quality of the work publishers submitted. Room to Read ended the contract early with one publisher since the publisher was not able to commit to completing their scope of work as outlined in their agreement. It is not clear whether a different RBF payment structure would have impacted that publisher's commitment to the REACH Project; however, the payment structure was successful for the four other partner publishers.

The last RBF payment to publishers was tied to their engagement in pooled procurement. Publishers were asked to participate in pooled procurement by marketing the storybooks to potential customers. If profit was made during the pooled procurement activity, the profit would be equally distributed to publishers at the end of the activity, thus, incentivizing publishers to find customers – the more customers, the more profit. The profit incentive was designed to increase pooled procurement orders (i.e. reach more children with the storybooks) and to establish the publishers as a new source of quality storybooks for customers. Publishers were initially responsible for marketing the REACH storybooks to encourage customers to order copies. While their role in pooled procurement was revised during the project (as explained in the Pooled Procurement section of this report), publishing partners successfully engaged in pooled procurement and received 100% of the pooled procurement profits at completion.

## Public-Private Partnership

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- The public-private partnership brought together key literacy stakeholders such as government, NGOs, publishers, and academics for the first time at a national level to discuss storybooks and the importance of reading for pleasure.
  - The public-private partnership created a government-endorsed set of recommendations called *What Makes a Great Storybook?* designed to inform policy on storybook selection. Through this document, the knowledge that lived with each literacy expert in South Africa was consolidated into one resource.
  - The resource was distributed by the public-private partnership for anyone to use, particularly, those who are selecting storybooks for school libraries and those who are publishing storybooks – aiming to impact both supply and demand for quality storybooks.
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### Public-Private Partnership Overview

The REACH Project brought together private stakeholders (the Publishers' Association of South Africa and academic institutions) and public stakeholders (officials from government and local literacy NGOs) to collaborate in developing guidelines for what makes a quality storybook in the South African context. It is common for South African literacy experts to collaborate to develop curriculum. Officials will also develop parameters for books and then call upon the book publishing experts to prescribe to them; however, the key stakeholders do not have a children's book publishing background. For the first time at a national level, the REACH Project brought together the country's key literacy, publishing, and children's book experts to create the public-private partnership (PPP). This standards-development initiative sought to build relationships and change the discussion around storybooks by ensuring that all informed stakeholders collaborated to develop the guidelines.

### Long-Term Value

The REACH Project wanted to impact the book supply and demand ecosystem which consists of government, NGOs, and private publishers. Historically, there has been an adversarial relationship between publishers and government, especially around textbooks. The project wanted to improve relationships amongst all the stakeholders, for the good of children's books and the growth of literacy across South Africa. As storybooks are sometimes seen as less political than readers with a curriculum basis, this intervention was an ideal place to begin repairing and growing relationships.

## Working Group

The REACH Project established a strong relationship with the lead of the South African Department of Basic Education, the Director General. The Director General partnered with the REACH Project to create the REACH Working Group, the committee responsible for planning and advising on all the major activities and decisions of the REACH Project.

The Working Group was composed of the following members:

- Two representatives from the Director General's Office, including a director and deputy director;
- One representative from each of the following National Department of Basic Education departments: Curriculum Foundation Phase, Early Childhood Development, Learning and Teaching Support Material, and Inclusive Education;
- One technical representative focused on book development and one from the Read to Lead Campaign;
- Two representatives from the Department of Arts and Culture;
- One representative from Neil Butcher & Associates, experts in open licensing; and
- Three representatives from Room to Read, all children's book publishing experts.

The roles and responsibilities of the Working Group were as follows:

- Ensure the project aligns with government policy;
- Assess what would work well, what might not work well, and suggest how to address and prevent potential challenges in implementation;
- Advise on the process of partner selection, such as publishers and NGOs, including criteria to be used to make selections;
- Review draft documents being prepared by the project, such as the draft quality storybook guidelines; and
- Participate in organizing any events or meetings, such as the January 2018 project launch.

## Reference Group and National-Level Workshop

The Reference Group was the group that convened for the standards workshop organized to begin planning the storybook quality guidelines. The Reference Group consisted of the Working Group, representatives from the three provincial education departments (Limpopo, Mpumalanga, and KwaZulu-Natal) with whom the project planned to work, literacy NGOs, the Publishers Association of South Africa (PASA), and the University of Pretoria. The REACH Project wanted to ensure that not only national and provincial government officials were

present, but also publishing representatives and key literacy and children's book-focused NGOs. Relationships with the African Storybook, Book Dash, and Puku Books/Pukupedia forged in this group also informed the project as they and their affiliates continued to partner with the REACH Project throughout key development and implementation stages.

The Reference Group participated in the REACH Project's two-day workshop, facilitated by Room to Read, Puku Books, and African Storybook, to launch the development of the storybook quality guidelines. The workshop was largely successful in launching the conversation on what makes a quality storybook in South Africa, and the representatives brought a diverse set of perspectives given the variety of backgrounds. Generally, there was significant enthusiasm from participants, and a number of invitees brought others they thought would be interested. The workshop had approximately 40 participants from throughout South Africa.

As a result of the Working Group and Reference Group discussions, the project was able to incorporate many of the priorities expressed by the groups into the project. For example, the groups recommended that the project:

- Include a section on diversity and inclusivity in the *What Makes a Great Storybook?* document;
- Focus on small publishers;
- Focus on community writers who are native speakers of the REACH target languages;
- Open license the resources - the government strongly wanted this as they felt if they contributed to the content, then they should not have to pay for it; and
- Open license the storybooks with CC-BY so that others can create versions of the storybooks in Braille.

### **The Value of “*What Makes a Great Storybook?*”**

The final resource developed by the Reference Group, *What Makes a Great Storybook?*, provides a strong basis for understanding and discussing storybooks and reading for pleasure in South Africa. These recommendations begin with an opening letter written by the Minister of Basic Education endorsing the document and highlighting the value of storybooks to improve the future of South Africa. The recommendations discuss the basics of what makes a storybook, diversity, content, illustrations, design, the illustration process, “versioning” or creating quality translations, and production. The recommendations are therefore relevant to both those who create storybooks and those who select storybooks.

The final recommendations drafted by the REACH Project were well received by the Reference Group as participants could see their contributions throughout the document, and for the first time, the knowledge that lived with each literacy expert in South Africa was consolidated into one resource. *What Makes a Great Storybook?* was distributed electronically to the entire Reference Group, including national and provincial government officials, publishers and NGOs. The approximately 40 Reference Group members were encouraged to further distribute the resource to their networks.

Since dissemination, the recommendations have been used by a variety of stakeholders to continue the discussion on the importance of quality storybooks in South Africa. The recommendations were recently used as the base document at a National Reading Coalition focus group discussion on access to reading resources.

Further, since the recommendations were used by the REACH Project to later develop storybooks, the Reference Group members were motivated to take ownership of storybooks. Puku Books director, Eleanor Sisulu, displayed and discussed the REACH storybooks books during an interview on a South African prime TV talk show. The Mpumalanga Department of Education printed copies of the REACH storybooks from their own budget and distributed them to government schools. Similarly, the KwaZulu-Natal Department of Education is discussing printing the books for their schools as well. This stakeholder buy-in stems from the pride and ownership of the *What Makes a Great Storybook?* resource.

## Publisher Engagement

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- The project partnered with community-based publishers who did not necessarily have storybook publishing experience, but who all had an immense passion for providing children with engaging, quality reading material in their home languages.
  - One publisher was selected for each of the five target languages.
  - Publishers were required to attend a series of capacity building trainings to equip them to develop and publish storybooks.
  - Each publisher was responsible for overseeing the development of four original storybooks and supervising a team of writers to create versions of other publishers' original storybooks in their own language – resulting in 20 storybooks in each language.
- 

### Publisher Selection Process

The Reference Group strongly recommended that the REACH Project focus on partnering with small, entrepreneurial African-language publishers. In South Africa, the publishing industry is dominated by large, multi-national publishers. Small publishers need mentoring and support in order to grow. They also have the passion to experiment, promote, and grow publishing in their native African languages. Unlike large publishers, they often have strong ties to their native language communities and are nimble enough in their business models to try experimenting with open licensing. The REACH Project decided to use the project to grow small publishers by:

- Building their capacity in publishing children's books;
- Mentoring and guiding them throughout the publishing process;
- Exposing them to all available networks and stakeholders;
- Affording them the opportunity and experience of producing high quality, high interest children's story books;
- Offering them a chance of finding outlets to sell their books at prices that sustain their businesses; and
- Introducing them to the open source model of providing books to a greater audience.

Thus, Room to Read created a flyer entitled *Empowering African Voices* (Appendix 1), and advertised for partner publishers to join the REACH Project in order to create a vibrant children's publishing industry in African languages. The publishers had to indicate their passion for empowering African voices in print. They needed to:

- Commit to the publishing of high-interest, high-quality children's storybooks;
- Be fluent in the project language in which they wished to publish;
- Have a network of authors, illustrators, editors, designers and translators/versioners in one of the five project languages; and
- Indicate a willingness to explore new retail business models using open licensing.

Publishers did not necessarily need to have experience with publishing storybooks because Room to Read would conduct thorough training in content development in order to increase the number of publishers in South Africa equipped to publish storybooks.

The advertisement was widely circulated, inviting small and new publishers to indicate their interest. Room to Read distributed the flyer at the Soweto's Abantu Book Fair, which attracts small, passionate publishers, and also ensured that the Reference Group forwarded it to their networks. Interested publishers needed to complete an application form where they indicated their mission, access to publishing partners, operational experience, institutional capacity, and willingness to explore open licensing. Twelve applications were received and evaluated by the Room to Read REACH team. The team selected five publishers, one for each project language. The team also decided to select publishers who were based in the province where the language was spoken. They would thus have access to the talent pool in that community and could thus easily find community writers and story tellers who were eager to contribute towards promoting and growing their language. For legal compliance, Room to Read also completed a due diligence process for the selected companies and verified that each complied with the tax laws of South Africa, had ethical business practices, and were equipped to partner on the project.

### **Selected Publishers**

Room to Read selected five final publishers for the REACH Project. Below is a summary of each publisher, and next to the publisher name is the language in which they published.

#### **Abantwana Publishing (siSwati)**

Abantwana is based in Mpumalanga and had previously published mostly novels. This publisher is very good in marketing and producing flyers to promote their books. They are a community-based organization and welcomed the opportunity to engage community-based writers.

Abantwana was particularly enthusiastic about the REACH writers' workshop as they had no prior knowledge of story development and had been relying on established writers.

Abantwana was also chosen because of their involvement in Early Childhood Development (ECD). One of the directors is a trained ECD practitioner. The director teaches in eSwatini (Swaziland) and has an established market for siSwati books in that country, which could possibly expand the reach of the REACH storybooks beyond South Africa.

### **Balaodi Publishers (Sepedi)**

This publishing house is based in Limpopo and is run by a newspaper editor who used to be a high school teacher. He is passionate about the Sepedi language and promotes reading to rural chiefs during regular meetings with them. He also is proud that he taught many well-known Sepedi writers in high school.

This publisher is the only one in the whole of South Africa who prints and supplies a newspaper in the Sepedi language. His passion for Sepedi language was evident in his involvement with the chiefs around Limpopo to promote reading in their villages.

### **Indwa Publishers (isiZulu)**

Indwa is based in KwaZulu-Natal and was already involved in developing children's books in English and isiZulu. This publisher stood out for the quality of their books. Indwa also partners with community-based organizations to make movies from youth novels, and they adapt children's stories into animation movies.

Indwa also stood out because the company was established by a group of female publishing professionals, led by a woman, whose father is a well-known and respected isiZulu author and lecturer.

### **Limpopo Faces (Tshivenda)**

Limpopo Faces is based in Limpopo in an area where the dominant language is Tshivenda. They have two Grade 10 Tshivenda novels prescribed in schools by the Department of Basic Education. The publisher has worked for the South African Broadcasting Corporation (SABC) as a writer and content producer of Tshivenda dramas and soaps.

Limpopo Faces was selected because they are already involved in community engagement to promote reading. They run story reading competitions and provide prizes in the form of books.

### **Sharp Shoot (Xitsonga)**

This Limpopo-based company is involved in publishing as well as printing and stationery supplies. They had no previous experience in the development and publishing of children's

books. Sharp Shoot had never engaged in writer training but commissioned established writers to write books meant for adults, such as novels and educational materials.

Sharp Shoot was also selected because they also have a printing section of their business and would benefit from exposure to the pooled procurement and sliding scale model, which will be described later in this report.

### The Publisher's Role

Each partner publisher appointed a Book Development Manager to manage publishing responsibilities for the duration of the project. Given their small size and large desire to learn, all the publishers decided to take on the responsibility of managing the book development process themselves.

Optionally, the publishers could identify an editor to assist with editing throughout the duration of the project. The editor would guide writers through the editorial and versioning process. If no editor was identified, the Book Development Manager would also act as editor. Only one publisher, Limpopo Faces, appointed an editor.

Each publisher was also responsible for identifying a team of writers who could also version (i.e. that take the original story in one language and create a new version of it in another language) and who were native speakers of the publisher's language.

In addition, the publishers would:

- Pay writers for their versioning work per their contract with Room to Read. The REACH Project provided publishers with the funding for this;
- Attend meetings and capacity building workshops;
- Host writer meetings as necessary during the book development process; and
- Support finding orders for pooled procurement within their networks.

The above responsibility of marketing the books during pooled procurement was revised during the project. See the Pooled Procurement section of this report for more information.

### Room to Read's Role

By participating in the REACH Project, in addition to the capacity building goals, Room to Read would specifically build key commercial skills and opportunities by:

- Providing the publishers with royalties from the pooled procurement, should there be a profit;

- Providing master files to all participants, so they could continue to print and sell the printed books in any language after the project concluded. This might include languages NOT published during the project: South Africa has eleven official languages so there are still five more languages in which the publishers could publish;
- Teaching publishers to use the national storybook guidelines so that their future books would fulfill government requirements; and
- Guiding publishers through how to version and design books in multiple languages and how to manage a pooled procurement processes - both can save them money through efficiencies of scale.

## **Meetings and Trainings**

The below sections outline the meetings and trainings led by Room to Read and partner NGOs for publishers during the REACH Project.

### **Introductory Meeting**

The first meeting was a ‘meet and greet’ for Room to Read and the partner publishers. In this meeting, publishers and Room to Read REACH team got to know each other and established a common understanding of project objectives. There was an explanation of what was expected from the publishers, as well as Room to Read’s commitments to the publishers. The meeting discussed contracts that the publishers would complete, both with Room to Read and with writers. Publishers were given guidelines on community engagement and writer selection. The schedules for the writers’ workshop, versioners’ workshop, and book development workshops were shared and discussed with publishers to ensure everyone could participate.

### **Open Licensing Meetings**

There were three separate meetings where open licensing was explained to the publishers, as concepts took some time to absorb. Open licensing was a new concept and publishers had many questions. Finally, they were all comfortable and eager to give it a try.

### **Writer Selection**

Publishers each selected four writers from their communities, for a total of twenty authors for the project. The focus was on community-based writers who had to be native speakers to keep the language and stories authentic and accurate. The aim was to get culturally rich and relevant stories.

The publishers requested CV's and portfolios from interested community members. Room to Read advised publishers to find more than the required number of writers so that there would be a larger pool from which they could choose. Then publishers sent Room to Read their selected writers' CVs and portfolios. Those who had not written anything previously were asked to create a one-page story. This was used to evaluate their story writing capabilities. Room to Read, together with the publishers, did the selection and finally four writers were selected from each publisher's list.

### **Writers' Workshop**

The project had five groups of four writers, each group representing one of the five languages. Room to Read organized a five-day residential workshop, as staying at the workshop locale ensures maximum concentration on writing and encourages team building. Room to Read staff conducted the workshop. The writers each brought a story they drafted for the project, and Room to Read coached the writers to revise and strengthen the stories. Room to Read also demonstrated how writers could mine their childhood experiences for story ideas. From these two sources, twenty manuscripts were developed. The writers shared their drafts in plenary sessions, where they read and evaluated each other's stories. After the workshop, the publishers went through the stories to check for quality, consistency, and to proofread them. Room to Read staff also quality-assured the stories after submission to check that they were of high quality, interesting, and age appropriate.

### **Versioning Workshop**

Each publisher was responsible for versioning their writers' stories into the other four languages. This meant that each writer would version four stories from the other languages into their own. Thus, each writer wrote one original story, made four versions of other writers' stories, and produced an overall total of five stories, making a total of 20 stories for each publisher. As a result, the project published 100 stories in African languages, and 20 in English (as English was the bridge language between each original African-language story to the other four African-language stories), making a total of 120 stories.

### **One Day One Book**

Publishers joined the One Day One Book workshops (see the One Day One Book Workshop section below to learn more about these workshops) in order to be part of the full book development process and so they could oversee the illustrations, design, and lay-out for their storybooks. Publishers played an important role in being the link between the editor, illustrator, designer, and author. The publishers took important decisions if the number of pages had to be reduced, text cut out or changed and generally worked closely with the editor on changes to the story. Most of the publishers were very excited because most had never been part of this final stage of the book development process.

## Open Licensing

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- To benefit others beyond this project, Room to Read applied a Creative Commons license to all REACH materials development which allows anyone to freely use the material.
  - The project chose the CC-BY license which is the most open and flexible license allowing for others to distribute, remix, tweak, and build upon the original work, even commercially, as long as they credit the original creators for the original creation. This enables the storybooks to be widely distributed, versioned into other languages, and adapted for other contexts.
  - The project partnered with licensing experts, Neil Butcher & Associates of Johannesburg, to build the capacity of publishers and others on open licensing concepts.
- 

When someone creates a work product, as the copyright holder they can choose to apply an open license to their work to grant the public the right to share, remix, and/or commercialize their work. There are various types of open licenses that exist. With all licenses, the copyright holder retains their copyright, but some licenses allow others to do more with the work than other licenses. The copyright holder can decide how “open” the license will be depending on their priorities. More information on the various types of open licenses can be found on the Creative Commons website<sup>4</sup>. The value of an open license is that rather than the work being restricted to and only benefiting the creator, the work becomes accessible to anyone who can benefit from it.

As the use of an open license was required by the REACH Project, Room to Read first worked to educate the publishers, creators, and stakeholders about the licenses. For this, Room to Read partnered with Neil Butcher & Associates of Johannesburg (NBA). NBA have been researching early literacy and open licensing for the past several years under a grant from the Hewlett Foundation. They assisted the project both to articulate the nuances of open licensing, as well as to support the publishers in growing their understanding of open licensing concepts. NBA, in exchange, evaluated the open licensing aspects of the REACH Project as a case study for their research.

After internal discussion, the project ultimately decided to use CC-BY, the most open license, for this project. The project selected CC-BY as it allows the most flexibility for public reuse—and in this case, the first re-users would be the project publishers themselves, within the project. CC-BY is also the most “in the spirit” of collaboration, which Room to Read sought to promote between publishers and organizations within this project. Finally, the other open

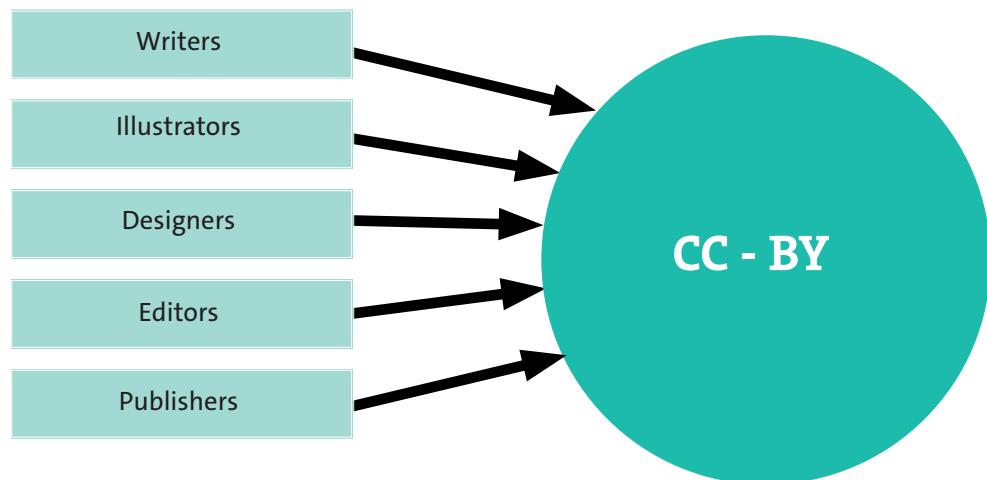
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<sup>4</sup> <https://creativecommons.org/share-your-work/licensing-types-examples/>

licenses might require more oversight/potential concern on the part of the publishers, as they ask users to refrain from certain activities. Crucially, even if a license violation were discovered, litigation would be too expensive to be worthwhile. Thus, the CC-BY license felt like the best option for this project.

The application of the CC-BY license in practice occurred in two ways. First, in order to facilitate the right spirit of equality between contributors to the One Day One Book workshop, each individual contributor signed an agreement making their piece of work CC-BY.

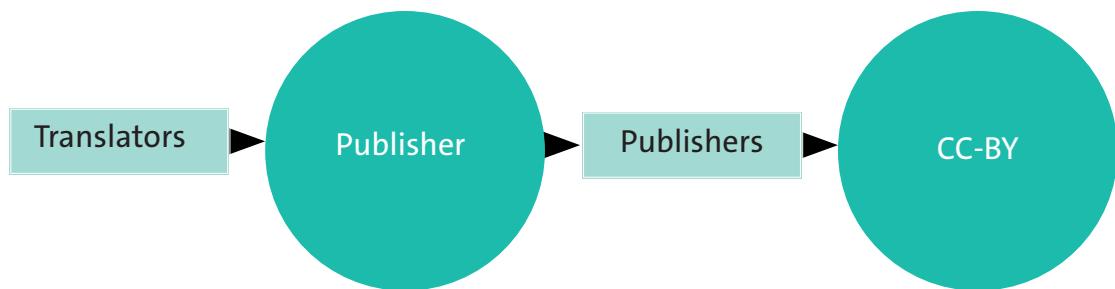
*Figure 3 - Licensing Assignment for 20 Original Storybooks*



This worked well because no contributor was paid for their participation in the event—every creator was a volunteer. In this case, each individual contributor retained the copyright to their piece of work, and each person will need to be credited in any derivative works.

The project used a different model to assign a CC-BY license for the versions, because in this case the versioners were contracted for their additional work to version the 20 original stories into 80 additional stories (plus 20 in English to bridge the languages), for a total of 120 stories. In this model, all translators/versioners signed a work-for-hire contract with the publishers in which they assigned their copyright in the work to the publisher. The publisher then licensed the translation CC-BY.

Figure 4 - Licensing Assignment for Additional 100 Stories



## One Day One Book Workshops

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- The project developed the storybooks through single-day workshop events that brought together all book creators – the writers, illustrators, designers, editors, and publishers – in one room.
  - The project partnered with a local NGO, Electric Book Works, an affiliate of Book Dash, to implement the workshops.
  - The workshops were an effective way to develop storybooks under a short timeline and to provide significant capacity building to participants who do not usually see the book development process from start to finish.
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The REACH Project partnered with Electric Book Works to illustrate, design, and version the 20 project storybooks. Electric Book Works is an affiliate of Book Dash, a South African NGO that believes every child should own one hundred books by the age of five. The name, Book Dash, comes from their book-creation process: a single-day event where volunteer teams of skilled creative professionals come together to create new children's storybooks in just 12 hours. Electric Book Works uses a similar Book Dash-style workshop to develop storybooks.

While Room to Read regularly holds book development workshops with local creators in South Africa, the project partnered with Electric Book Works to employ the Book Dash Model for the REACH Project for several reasons as outlined below.

### **Partnership**

Book Dash was a key member of the REACH Reference Group who contributed to development of the *What Makes a Great Storybook?* resource. Engaging the Book Dash affiliate, Electric Book Works, was an exciting way to continue engaging and collaborating with other South African literacy stakeholders throughout the project.

### **Efficiency**

To deliver the storybooks on the REACH Project timeline, the project was interested in using the Book Dash Model to develop the storybooks faster. As stated in the introduction, the Model ensures that books are developed and completed in one single day. This means the traditional book development process which normal takes months is squeezed into a weekend. Since all the writers, illustrators, designers, editors – and in the case of the REACH Project, the publishers – are gathered into one room to collaborate while developing the books, the usual time required for back-and-forth email communication for feedback was essentially eliminated.

## **Capacity Building**

The Book Dash Model brings together creatives who, in the traditional model, are all involved in the book development process, but who rarely ever meet or collaborate in real time. For example, while any storybook involves writers and illustrators, they rarely get to see or provide significant input into each other's work as they develop their respective sections.

There was significant capacity building for all creators involved to learn the entire book development process. For example, while an illustrator usually only sees the illustration process, they were able to expand their understanding of book development by engaging in the process of writing stories, editing, and designing. The authors, especially, were fascinated to see their stories being transformed into books right in front of their eyes as the illustrators worked on the artwork and the designers laid out the pages.

Below are some quotes from creators who participated in the REACH One Day One Book workshops:

*"[The workshop] brought authors, editors and illustrators together for a common task, giving each an opportunity to have a glimpse of what each party thought. It allowed for discussions about changes of some of the original words by the author as illustrations add another dimension to the story. It also offered opportunities, especially for authors, to see the power of illustrations and how they can alter meanings of stories. This, I believe has substantially altered the way authors thought about their stories - that illustrations are as powerful or even more powerful in relating a story."*

**- Diphete, Publisher (Balaodi)**

*"I love it all, from beginning to end, even though I felt I was herding cats at times! As an editor, it was such a valuable experience being able to work with authors, illustrators, designers and publishers in one room. Most editors have very little to do with the artists and designers of books, so it was a valuable learning experience for me - very humbling too."*

**- Fiona Wallace, Editor**

*"I enjoyed the event. I believe the current model is perfect as it allows you to work side by side with your designer, hence skills are exchanged, and relationships form easier. And also, it promotes teamwork and communication!"*

**- Joseph Somwe, Illustrator**

*"It is something that I am definitely going to use in future. It is a time and money saving strategy. Money is something very scarce for us as small businesses. This model can be definitely used in future. I highly recommend it."*

**- Peter C. Maidu, Publisher (Sharp Shoot)**

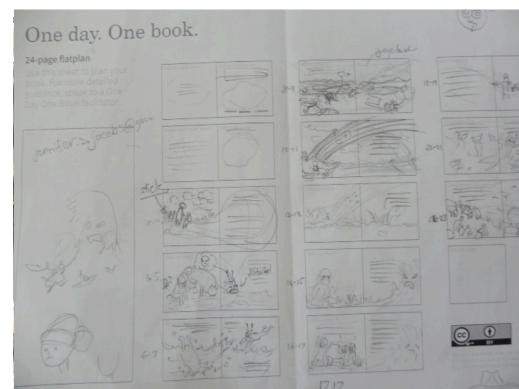
### **Cost Effectiveness**

The Book Dash Model makes use of professional volunteer writers, illustrators, editors and designers. This means the project was able to keep the project costs within budget, especially as the illustrators, editors, and designers did not need additional technical trainings in the form of workshops before the One Day One Book workshops to execute their work.

Overall, the One Day One Book workshops exceeded expectations. The project completed all 20 original stories through close collaboration between writers and editors. Further, the 20 stories were illustrated and designed by professionals who poured themselves into the creative process during the event. Publishers were able to learn the book development process from start to finish. The result was 20 international-standard storybooks for children.

The atmosphere of collaboration between the book creators were highlights as well. In traditional storybook development, there oftentimes is tension between creators. For example, writers are usually uncomfortable with the way illustrators interpret their stories and bring new elements to the storyline (or completely change the story) with their illustrations. Since all creators were sitting together during the workshop, they were able to explain the background and nuances of their respective work areas, discuss, and make decisions together. There was harmony among all the creators and the level of cooperation was inspiring.

Since there is tremendous pressure for the illustrators to deliver artwork within a very short period of time, the project observed that towards the end of the day, illustrators were getting tired and the quality of their artwork sometimes suffered. To mitigate this, the project built in additional time, approximately two weeks, after the workshop for illustrators to polish off their artwork.



## Versioning Stories

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- All 20 original stories were written in one of the five target African-languages. The stories were then “versioned” into the other African-languages.
  - Versioning is creating a new story in another language that captures the meaning and essence of the original story, rather than word-for-word translating.
  - English served as the “bridge” language between the original story language to the other versions.
  - Including the English versions, a total of 120 stories were created through the project.
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### Definition of “Versioning”

Translating a story means a word for word re-writing of that story. Translating is translating words, whereas versioning is translating the meaning of the words and the story. A simple example is provided below:

- Dikgomotša tate (Sepedi original)
- Cows of my father (English word-for-word translation)
- My father’s cows (English version)

After the 20 original storybooks were developed, the project chose to train writers on versioning to ensure the original stories were not word-for-word translated so that the authenticity of the stories would be maintained. The project felt it was important that the stories maintain an African-language flair and do not sound like they were originated in English as each original story was written in an African-language.

After each story was versioned into the other project target languages, the versions needed to be reviewed to ensure quality. The writers exchanged the stories they versioned and each checked that the versioning was correctly done. The editor and/or the publisher also had to quality check the version.

### Addition of English

English was the bridge language used to communicate among the writers and Room to Read staff at the versioning workshop. It was the language into which each story had to be versioned from its original language, so that the other language writers could version the story into their native language. Thus, as the versioning process meant the project already had quality English versions of each of the stories, the project decided to print the storybooks in English as well to help grow printing orders.

## Partnership with African Storybook

From the beginning, African Storybook was part of the project's public-private partnership as a Reference Group member. African Storybook has a strong presence in South Africa and a key part of their work is to version all their stories into most of the languages spoken on the African continent. Room to Read chose to leverage African Storybook's expertise in versioning to inform the project.

African Storybook thus conducted a versioning workshop for the publishers and Room to Read staff. The project then employed a cascading model, where the trained publishers and Room to Read staff then trained the project writers.

Room to Read also asked African Storybook to put their expertise into a written document for the project, which could be shared with project partners. Thus, African Storybook developed the content of the *What Makes a Great Translation?*<sup>5</sup> document, which Room to Read then adapted and designed for the REACH Project.

Together with *What Makes a Great Storybook?* the REACH project is able to provide the public with open licensed resources on creating and selecting quality storybooks as well as versioning existing storybooks into other languages to multiply what already exists into more quality books.

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<sup>5</sup>Room to Read used the word “translation” in the title of this document as it is more widely understood than “version.”

## Pooled Procurement

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- Pooled procurement involves combining print orders from multiple stakeholders to achieve lower unit costs for everyone compared to if each stakeholder had their own small print-run. In addition to pooling orders together, the REACH pooled procurement model involved Sliding Scale by Language, Co-Edition Printing, and Publisher Collaboration.
  - The project implemented pooled procurement to explore new business models for publishers that would make publishing African-language storybooks more profitable, and thus possible for their businesses.
  - Pooled procurement also provided the opportunity to distribute more REACH storybooks to children throughout South Africa.
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### What is Pooled Procurement?

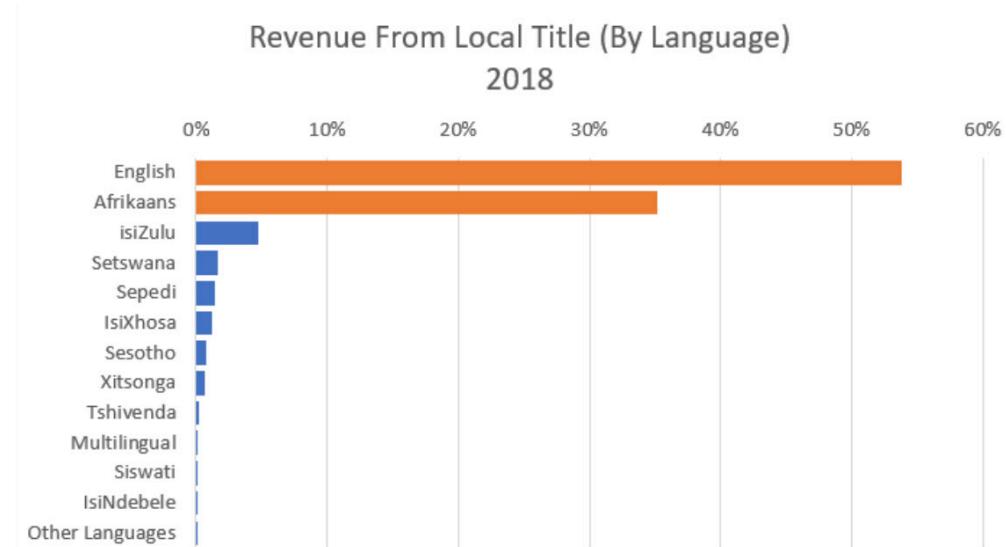
In the pooled procurement model, a publisher collects customer orders before printing, combines many small orders together, and then submits a consolidated order to the printer. By doing so, the publisher achieves economies of scale by doing a large print-run therefore driving down the unit cost. The pooled procurement model can benefit both the publisher and the customers. In many low-income contexts, publishers print small quantities with high unit costs because they do not have enough guaranteed orders to achieve the cost efficiencies of large print runs. However, by combining many orders together after an initiative like a marketing campaign, publishers can secure lower unit costs. Lower costs mean increased profit and a more sustainable business. Instead of retaining all profit, publishers can also choose to lower the sale price. Many South Africans are interested in purchasing high quality children's books for their programs, schools, libraries or homes, but often the books are too expensive. Since pooled procurement can bring down the unit cost, customers can benefit from lower unit costs even with small orders.

### Why Pooled Procurement?

There were two primary benefits to including pooled procurement in the REACH Project: 1) to demonstrate a model for publishers that could make publishing African-language storybooks profitable, and 2) to increase distribution so that more children in South Africa can have access to high-quality storybooks in their home language. These benefits play directly into the overall goal of the REACH Project, which is to improve access to African-language storybooks in South Africa by impacting the book supply chain.

To have sustainable impact on South Africa's African-language storybook industry, the project partnered with local South African publishers. Publishers are the key stakeholders in the book supply chain because publishers decide what content is created and available on the market. However, many publishers face a market where there is low demand and therefore little profit for indigenous language storybooks. As a result, many publishers choose not to work in the indigenous language book market. For example, South Africa has 11 national languages and more than 35 languages spoken. Despite that, the Publishers Association of South Africa (PASA) reported that in 2018, approximately 90% of publishing profit came from material in European languages - English and Afrikaans. Material published in all African languages combined only equalled approximately 10% (*Figure 5*).

*Figure 5 - South African Publishing Revenue for Local Titles by Language*



*Data from Publishers' Association of South Africa, 2019*

Further, in many countries like South Africa, supply is driven by the government since the government is the main customer for publishers. Many governments prioritize purchasing material like textbooks and didactic readers, rather than storybooks, so there is little incentive for publishers to focus on storybooks.

## The REACH Pooled Procurement Model

The REACH Project incorporated and coached publishers on several strategies to increase publisher profit. These strategies were:

- 1. Sliding Scale by Language:** Setting price by language
- 2. Co-Edition Printing:** Printing multiple languages in the same print run
- 3. Publisher Collaboration:** Publishers sharing stories with each other so each can create versions in their own language and then printing together to achieve lower unit prices
- 4. Pooling Orders:** Realizing economies of scale by combining small orders into one larger order

### Sliding Scale by Language

The project incorporated sliding scale into pooled procurement to explore how a range of prices impacts profit. Applying sliding scale simply means selling books at different prices. Frequently, businesses offer customers different prices based on quantity. For example, a customer who orders more gets a lower price per copy. However, the project did not want to establish sliding scale based on quantity because doing so would make books more expensive for smaller customers who could not afford large quantities. As stated earlier, the demand for English-language storybooks is high in South Africa while demand for African-language storybooks is low. The project therefore experimented with offering books at different prices based on their language. The project priced all African-language books at the same, low price, and sold English versions at a higher price. This approach kept the African-language versions at the lowest possible price while taking advantage of the high demand (and profit) of English-language material.

To establish the sliding scale prices, the project first needed to project the true cost of printing to ensure that at a minimum, the price per copy was more than the cost of printing. If a publisher prints small batches and then sells the books to customers, the publisher knows how much it cost them to print, and they can set a price to recover their costs. However, pooled procurement works in reverse order – the publisher collects orders before printing, and they do not know how many orders they will receive before they must set a price. Consequently, the project needed to project the print-run size in order to attempt a price that would at minimum cover the cost of printing. The project obtained prices from the printer based on potential print run sizes (e.g. how much would it cost to print 1-1,000 copies, 1,001-2,000 copies, 2,001-3,000 copies?). After obtaining the price ranges, the project estimated the print-run size per storybook. After projecting the true cost per copy, the project was able to set the sliding scale prices.

When setting the sliding scale prices, the project balanced the two priorities of 1) testing models that publishers could incorporate into their businesses to make publishing storybooks profitable for them in the future, and 2) making the REACH storybooks widely accessible to children across South Africa. On the South African market, the average storybook costs approximately R80-150. For REACH, the project set the African-language versions at R10 per copy and the English versions at R14 per copy. Since the project's priority was on African-languages, the price of the English-language books was marked up more to establish a sliding scale and generate a small amount of profit for publishers. If the project was only prioritizing strengthening publisher businesses, the project would have set the prices closer to market rates. In the end, the project offered high-quality, culturally relevant storybooks to the public at prices up to 93% less than the storybooks on the market. Although the prices were not set prioritizing profit, publishers were still able to see how setting different prices can generate profit. By doing so, the project modeled how publishers could version their storybooks into English and Afrikaans in the future to make profit on highly purchased languages, while keeping African-language books affordable and accessible.

While South African publishers reported to PASA in 2018 that only approximately 10% of their profit came from African-language book sales (*Figure 5*), the REACH Project experienced a very different result. The REACH pooled procurement model generated a total profit of R48,841, of which R22,999 came from African-language storybooks. In other words, 47% of profit came from African-language storybooks, demonstrating that perhaps if quality African-language storybooks are supplied on the market, demand (and profit) may increase. Towards the end of the project, the profit from pooled procurement was evenly distributed by Room to Read to the final participating REACH publishers. Although currently little profit is generated by African-language material in South Africa, the REACH pooled procurement model demonstrated that that can change.

### **Co-edition Printing**

Co-edition printing means combining multiple print jobs into a single print run. For example, if a publisher needs to print Book XYZ in Language A (300 copies), Language B (300 copies), and Language C (300 copies), instead of submitting three print runs of 300 copies each to a printer, they can combine their order into one print run of 900 copies. By having a larger print run, publishers can get a lower cost per book.

Many small publishers do not realize that if they print books in multiple languages, they can negotiate lower printing prices by using co-edition printing. Further, many printers do not understand how to use their machines to yield this efficiency. Room to Read met with printers and explained that since the illustrations for each language are the same, the

printers can first set up the color ink plates and keep them the same when printing each language. Then, to print each language, the printer only needs to adjust the black ink plates since all the text is in black. By organizing the ink plates in this way, the final REACH partner printer was able to charge the project for 20 large print runs (one for each original title) rather than 120 small print runs (one for each language) and as a result offer a lower unit price.

### **Publisher Collaboration**

The REACH Project encouraged publishers to develop books together and print together to increase the size of the print runs and achieve lower printing prices per copy. While publishers working in the same general location might see each other as competitors, the REACH Project chose publishers who could work collaboratively. To facilitate this, the project selected mission-driven publishers who each specialized in printing one of the project's five target languages. As previously explained, after each publisher created their four original storybooks, the publishers shared their storybooks with each other so that they could create versions of the original titles in their respective languages, resulting in 120 total titles. Instead of each publisher printing the storybooks in their respective languages separately from the other publishers, the project facilitated one, large print run combining all the languages together (using co-edition printing). Publishers were able to see the power of collaboration to increase their number of books and to get lower unit prices when printing.

### **Pooling Orders**

The heart of the pooled procurement model is pooling many small orders together to create one large print run. To do this, the project launched a marketing campaign before the public could order copies of the REACH storybooks. While it would usually be costly for someone like a small NGO to print copies of the storybooks on their own, the public was able to get the significantly lower prices of a large print run because their orders were combined with other customers, including the REACH-funded order of 46,300 copies for government schools. Any South African entity could order books such as organizations, governments, businesses, schools or individuals. While the REACH target areas were Limpopo, Mpumalanga, and KwaZulu-Natal, customers could be located anywhere in South Africa.

Before pooled procurement could launch, Room to Read established new systems to manage the pooled procurement model. Internally, Room to Read's accounting team created new accounting systems to receive and manage customer payments, including working with a local consultant to understand South African law and accounting regulations related to book sales. To receive book orders, the project created a platform where customers could review the books and place orders. In partnership with Electric Book Works, the project established

an online portal for pooled procurement located at <http://onedayonebook.org/> and used Google Forms to create the order form. On the website, customers could learn about the REACH Project, review PDFs of all the final books, review book ordering FAQs, read the terms and conditions for placing an order, place their book order, and access all the open licensed book files. To decrease the administrative cost of managing very small orders, Room to Read established order minimums. Generally, the project required a minimum total order of 100 copies and a minimum order *per book* of 50 copies. If a customer wanted to purchase books but could not order the minimum, they were encouraged to combine their order with others. After the systems were set up for ordering, the project could move forward with marketing the books and collecting book orders.

The project marketed the REACH books to the public through email before and after the storybooks were completed. Two months before the books were complete, Room to Read emailed the public-private partnership members, literacy-focused NGOs, government officials, and others throughout South Africa to inform them the books were in development and would be available for purchase. See Appendix 2 for the initial announcement flier. When a sample of the 20 original storybooks were print-ready, Room to Read emailed out the ordering website which included PDFs of the final books and the prices. One week later, the ordering period launched, and orders could be placed for two weeks. The public were able to order any of the 20 books in any of the five project languages – isiZulu, Sepedi, siSwati, Tshivenda, and Xitsonga – as well as English.

Originally, publishers were going to participate in pooled procurement by marketing the REACH books to their network; however, the plans changed as pooled procurement was launching. During the marketing period, publishers were hesitant to market the books. Room to Read learned that publishers were not familiar with digital marketing. Instead, publishers were accustomed to marketing in-person with printed books because many of their customers expect to feel the quality of the paper and see how well the books are printed and bound before committing to purchase. Instead of asking their customers to order copies through pooled procurement, the publishers opted to purchase copies for themselves to resell to their customers after they were printed.

The project planned for the South African government to participate in pooled procurement as well; however, those plans were complicated due to a variety of factors. In alignment with the Read to Lead Campaign, the Department of Basic Education joined the REACH public-private partnership, contributed to the *What Makes a Great Storybook?* resource, and endorsed the document by providing the opening foreword statement. To further support the Read to Lead Campaign, the Department of Basic Education and provincial governments

expressed enthusiasm about ordering copies of REACH storybooks for additional government schools. Due to a variety of factors such as 1) provincial budget cuts, 2) the REACH Project timeline not directly aligning with provinces' purchasing periods, and 3) provinces having procurement restrictions with approved-vendor lists, the government was unable to order copies during the pooled procurement period. However, since the REACH books were open licensed, the project provided the government with the book files and the Mpumalanga government was able to print them while adhering to their internal procurement requirements. As a result, Mpumalanga printed and distribute 38,987 additional copies of REACH storybooks to government schools during the project.

After all pooled procurement orders were placed, Room to Read consolidated the book orders and submitted one order to the printer.

# **Storybook Distribution and Results**



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- The project distributed a total of 101,820 copies of the REACH storybooks throughout South Africa. Of the total books, 46,300 copies were funded by the project and 55,520 copies were funded by the public – either through pooled procurement as a result of open licensing.
  - Pooled procurement reduced the unit cost of printing for customers by 40% and for Room to Read by 6%.
  - Through pooled procurement, the project was able to offer quality African-language storybooks to the public at prices up to 93% cheaper than storybooks available on the market.
  - While approximately only 10% of publisher profit comes from African-language book sales (Figure 5), the REACH pooled procurement model generated 47% of its profit from African-language storybooks.
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The REACH storybooks were distributed to both children in government schools as well as customers who ordered storybooks through pooled procurement. The below sections outline distribution and results information for both sets of beneficiaries.

### Pooled Procurement Results

Pooled procurement customers ordered a total of 16,533 copies of REACH books. A total of 26 customers participated - 17 individuals who combined their order, five organizations, and four publishers. The organizations who participated in pooled procurement range from traditional literacy-focused NGOs to social franchises. The organizations focus on literacy in schools, the home, and the community, so their participation in pooled procurement gave children beyond government schools access to the REACH storybooks. All the participating organizations have missions rooted in increasing children's access to African-language books. One of the organizations, Ekufundzeni Mobile Library, states on their website:

*"The main challenge of the mobile library is the need to refresh our book stock to modernise it and make it more relevant to the curriculum and our African context. Most of the books we have in our stock of nearly 20,000 books are donated books. These books have served us well, but they do not cover the entire curriculum and are mainly western-centric in their articles and characters."*

When finalizing their pooled procurement order, this same organization said:

*"I am happy to increase [our order] to 50 books [per storybook] as you suggest since a lot of the classes are 50+ so the educator could borrow the whole lot for each child. Thanks, and really looking forward to seeing the excitement of the educators when they see how many books, I have got for them!"*

**-Ekufundzeni Mobile Library**

Further, many Room to Read staff members located throughout South Africa and from a wide variety of departments in the organization ordered copies of books for children in their families. As South Africans, Room to Read's own staff responded to the public opportunity to place book orders. Although Room to Read regularly publishes children's books for government schools in South Africa, the pooled procurement activity through REACH was the first time Room to Read books were made available to everyone for ordering.

With REACH funding, Room to Read ordered 46,300 copies of the books for children in Limpopo, KwaZulu-Natal, and Mpumalanga government schools. Pooling customer orders alone without adding REACH-funded copies would have sufficiently demonstrated the benefit of pooling small orders to achieve the cost efficiencies of a large print run. However, since the REACH Project added the ability to increase the size of the pooled procurement print run, customers benefitted from even lower prices.

The pooled procurement print run combined the customer orders of 16,533 and the REACH-funded order of 46,300 for a total of 62,833 copies. If each customer had printed copies of the storybooks on their own without participating in pooled procurement, their print orders would have been fallen within the 0-1,000 copies per book range with a unit cost of R10.85, not including any administrative costs or mark-up for profit. With pooled procurement, the number of copies per book fell within the 3,000-4,000 range with a unit cost of R6.49. By pooling orders, the project decreased the unit cost for customers (including publishers) by more than 40%. Similarly, Room to Read's print order without additional customer orders would have fallen within the 2,000-3,000 copies per book range with a unit cost of R6.95. As a result, pooled procurement decreased the unit cost for Room to Read by more than 6%.

*Table 3 - Impact of Pooled Procurement on Printing Unit Cost*

Participant	Average Order Size Per Book	Unit Cost if Ordered Independently	Unit Cost with Pooled Procurement	%Unit Cost Reduction
General Customers	<1,000	R10.85	R6.49	40.1%
Publishers	<1,000	R10.85	R6.49	40.1%
Room to Read	Between 2,000-3,000	R6.95	R6.49	6.6%

Table 4 below shows the total copies ordered through pooled procurement by language, not including the copies printed by the Mpumalanga government after pooled procurement.

*Table 4 - Number of Copies Ordered through Pooled Procurement by Language*

Language	Copies
Sepedi	44,210
isiZulu	11,220
English	4,385
Xitsonga	1,220
siSwati	1,218
Tshivenda	580
<b>TOTAL</b>	<b>62,833</b>

After receiving their copies of the REACH storybooks, some organizations shared their impressions of the storybooks and how they are using them:

*"The stories were told very well, and the books were reasonably priced. Illustrations play a huge role in our selection of books...These titles are incorporated with other donations we send out, which is average of 100 titles to each beneficiary."*

**-Biblionef SA**

*"Thanks again for the wonderful books we purchased from you. Children really enjoy reading these books and we are using them in our different programmes: Khulis Abantwana, Libraries, Reading Clubs, and Reach Out to Read Programme in Schools."*

**-Family Literacy Project**

The pooled procurement model was a significant endeavor that proved both more laborious to implement than expected and also successful in achieving the goals of 1) experimenting with a model that could make publishing African-language storybooks possible and profitable for publishers in the future, and 2) making the storybooks accessible to more children by achieving lower unit costs.

For the first goal, publishers gained tremendous knowledge on sliding scale by language pricing, co-edition printing, publisher collaboration, and pooling orders to generate increased profit. In particular, co-edition printing proved to be a relatively easy-to-implement yet

highly successful approach to reducing printing costs for publishers. The ability to transform African-language storybook publishing from a low-profit industry into a higher profit opportunity can be the difference between children having quality, South African storybooks available to them and not.

For the second goal, the project was able to offer quality African-language storybooks to the public at prices up to 93% cheaper than storybooks available on the market. By pooling orders, the project also succeeded in decreasing the unit cost of printing by 40% demonstrating the power of collaborative printing. As a result of the pooled procurement initiative, an additional 16,533 copies of the storybooks for children were ordered, printed, and distributed.

### Total REACH Storybook Distribution

The initial REACH distribution target was 128,500, however, the target was revised twice to adjust for two uncontrollable factors. One factor was the weakening of the USD against the ZAR. In 2018, the ZAR was forecasted to strengthen significantly against the USD, resulting in a 17% variance from the rate used in the original budget. Since the project budget was fixed at USD 500,000, the World Bank agreed to reduce the distribution target to 65,500. The World Bank agreed to further reduce the target to 46,000 after it was clear that provincial governments were not able to order copies of the REACH storybooks during pooled procurement despite strong commitment and enthusiasm at the launch of the project. Fortunately, the Mpumalanga provincial government eventually funded printing and distributing more REACH storybooks to government schools after the pooled procurement period. As shown in *Table 4*, a total of 101,820 copies of REACH storybooks were distributed through the REACH Project.

The REACH Project target provinces were Mpumalanga, KwaZulu-Natal, and Limpopo. Room to Read distributed all 46,300 REACH-funded copies to those target provinces. Both open licensing the books and the pooled procurement model created the opportunity for 55,520 additional copies of REACH storybooks to be printed and distributed to additional provinces in South Africa. The table below shows where books were distributed. It is likely that some pooled procurement customers delivered their books to a central headquarters or a main distribution hub. The pooled procurement customer numbers do not necessarily indicate the final location of the books.

Table 5 - Number of Copies Distributed to Province by Funder

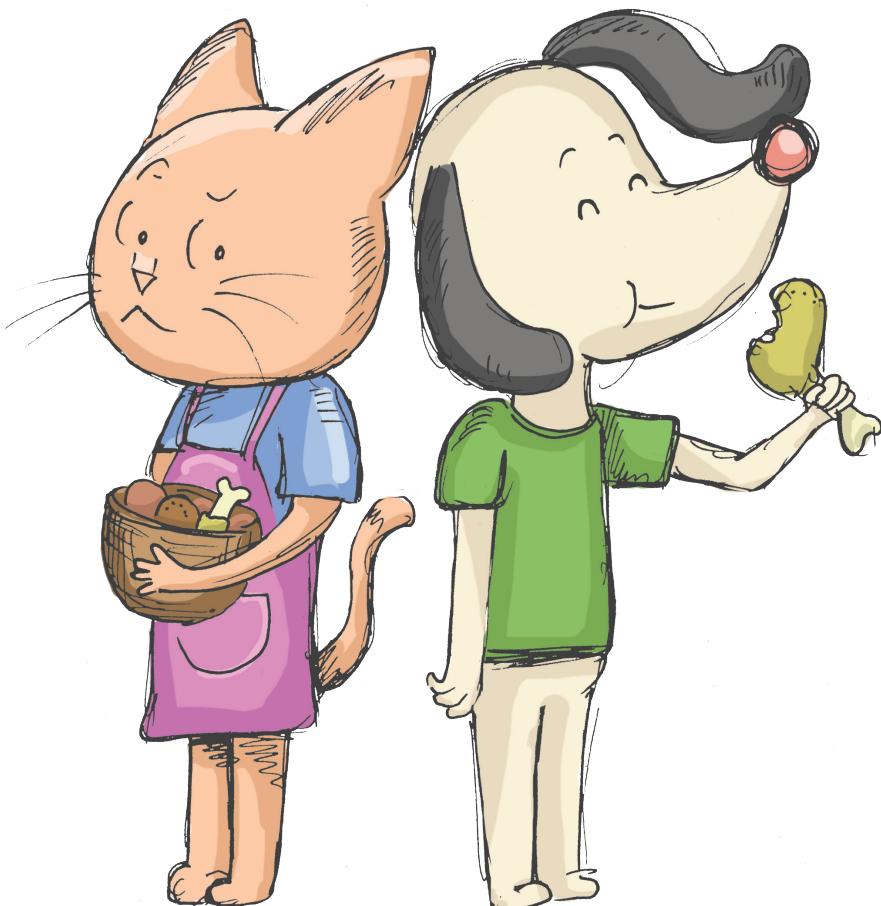
Province	Total Copies Distributed per Province	REACH-Funded Copies (Pooled Procurement)	Customer-Funded Copies (Pooled Procurement)	Mpumalanga Government-Funded Copies
Mpumalanga	47,287	8,300	0	38,987
KwaZulu-Natal	9,550	7,000	2,550	0
Limpopo	37,824	31,000	6,824	0
Western Cape	500	0	500	0
Gauteng	5,559	0	5,559	0
Free State	1,100	0	1,100	0
<b>TOTAL COPIES</b>	<b>101,820</b>	<b>46,300</b>	<b>16,533</b>	<b>38,987</b>

For more detailed results (i.e. number of available copies per student/class/school, book checkout, and title recognition survey results) specific to the REACH-funded copies distributed to the target provinces of Mpumalanga, KwaZulu-Natal, and Limpopo, please see Appendix 3.

The below images are from government schools that received copies of the REACH storybooks.



# Lessons Learned



From the REACH Project's experience, the project outlined lessons learned based on successes and challenges that arose for 1) Results Based Financing, 2) Public-Private Partnership, 3) Publisher Engagement, 4) Writers' and Versioning Workshops, 5) Open Licensing, 6) One Day One Book Workshops, and 7) Pooled Procurement. Key lessons learned are provided in the opening section, while more detailed lessons learned for each category are provided below.

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## KEY LESSONS

- If the financial burden to implement activities is significant, the implementor may need a non-RBF payment at the start of the project to help fund the execution of at least the initial activities. The type of partner with whom the project wants to partner particularly affects whether the RBF model is possible.
  - Inviting the public-private partnership members to take leadership roles can open opportunities for further collaboration throughout the project.
  - Beyond training on how to develop storybooks, publishers would also benefit from business development training.
  - It takes more time than expected to train on open licensing and to get buy-in from publishers and writers.
  - Open licensing can increase the reach of materials but also disrupts the traditional market model for publishers.
  - The Book Dash Model created significant capacity building for all participant to learn the book development process from start to finish.
  - While the whole pooled procurement model was effective in reducing printing costs and expanding the reach of the storybooks, the co-edition component of printing was an effective way to achieve lower unit costs and is a model that publishers can easily absorb into their future business practices.
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# Results Based Financing

**Lesson 1: If the financial burden to implement activities is significant, the implementor may need a non-RBF payment at the start of the project to help fund the execution of at least the initial activities.** The RBF model depends on the implementor to pay for the initial costs of implementation, with RBF payment after the completion of activities. If the implementor has a significant and flexible operating budget or if the implementation activities do not have significant associated costs, then the implementor may be able to wait until the activities are complete to receive funding – this was true for the case of the writers since there were little to no material costs to develop manuscripts. However, two of the three partners to whom the RBF model was applied (Room to Read and publishers), strongly preferred an initial payment upon signing their respective agreements in order to pay for the initial implementation activities.

**Lesson 2: The type of partner that the implementing organization chooses affects whether the RBF model is possible.** If a project prioritizes working with local partners who are part of the community that the project aims to benefit, it is very likely that the partners will not have an operating budget that can support activity costs upfront. In those cases, a non-RBF payment at the start of the project will likely be required. In the case of this project, Room to Read chose to partner with small publishers who as a result had small operating budgets and required upfront funds. However, if Room to Read chose to work with larger South African publishers who work internationally, it is possible that those publishers could have completed their full scope of work without an initial payment. The type of partner a project selects depend on the objective of the project, and some partners may be able to follow a pure RBF payment model, while many (especially if part they are part of the beneficiary community) may not.

**Lesson 3: Industry standards matter. Some industries' payment structures are already designed using an RBF approach.** Many contractors like writers, for example, are usually paid after the successful completion of their work. In those cases, applying an RBF model based on key deliverables is not difficult or new, and those cases are primed to incorporate more of an outcomes-focused RBF approach.

**Lesson 4: RBF is highly successful when applied to the primary implementing organization.** As described in the Results Based Financing section above, the RBF model (when modified to provide an initial payment to support early implementation costs) is highly successful in 1) reducing administrative costs associated with heavy financial and narrative reporting,

2) ensuring the project prioritizes time and resources towards program design and implementation, and 3) incentivizing the implementation organization to spend funds efficiently and only on costs that add value to the project.

## Public-Private Partnership

**Lesson 1: A common goal can unite those who have not always worked well together.** The public-private partnership brought together a range of stakeholders to discuss reading for pleasure for the first time at a national level. This partnership resulted in outstanding collaboration between stakeholders who had never had an opportunity to collaborate before. Historically in South Africa, there has been a division between those who make profit (such as publishers) and those who do not (such as governments). At the Reference Group workshop, the discussions allowed participants to be united by the same target and participants were able to put differences aside. Further, a key incentive to participate was to create the *What Makes a Great Storybook?* resource. The recommendations document was not a tool that would only be used to inform the REACH Project. Rather, all participants would walk away from the partnership with a resource that consolidated knowledge from each literacy expert that they could keep and apply to their work.

**Lesson 2: High-level government engagement helps with buy-in from officials and ensures success.** In the past, Room to Read engaged with operational-level staff and subject advisors, without participation from more senior-level decision makers. Through the REACH Project, the Director General endorsed and supported the project. Further, Heads of Department from the three target provincial education departments ensured they had representation in the Reference Group. Support at this level helped the project gain traction, including receiving participation from officials who could help disperse project materials more broadly.

**Lesson 3: Closely aligning the project with existing government priorities and initiatives helps ensure strong government participation.** At the start of the project, the South African government was prioritizing 1) the Read to Lead Campaign which focused on schools establishing libraries and reading for pleasure, and 2) uplifting the African languages. However, the government struggled to get sufficient resources for these initiatives. This project was able to gain significant government support because it closely aligned with existing government priorities. Further, since government officials from various departments joined the public-private partnership, the project was able to further discuss and incorporate a wide variety of government priorities.

**Lesson 4: Clear roles and responsibilities need to be established for members of the public-private partnership.** At the beginning of the partnership, members were not all clear on the purpose of the group and their roles. Some government representatives were asked to join the group by their department heads, but they did not receive information about the group before attending. The project later created a roles and responsibilities document which helped provide clarity, but it would have been ideal to create the document before launching the partnership, to be reviewed at the opening session.

**Lesson 5: A diverse group of participants in the public-private partnership can strengthen the design of the project.** The REACH Project had strong representation from a range of key stakeholders across the government, NGOs, and publishing representatives. Since a diverse set of participants were invited to join, the news spread and several individuals from a variety of sectors asked to join who were not initially invited. The diversity of participants helped the project gain support from a variety of sectors. The project was also able to receive input at the start of the project from a wide range of perspectives which informed all parts of the project from the *What Makes a Great Storybook?* document to partnership selection.

**Lesson 6: Inviting the public-private partnership members to take leadership roles can open opportunities for further collaboration throughout the project.** The project wanted to communicate that the REACH initiative was not just a Room to Read Project, but a collective initiative and that all should “own”. For example, African Storybook and Puku Books helped facilitate the Reference Group workshop, which eventually led to further involvement (African Storybook supported the versioning work) and advocacy (Puku Books endorsed the project on TV and engaged with the REACH storybooks on Pukupedia).

**Lesson 7: Design matters.** Room to Read wanted the *What Makes a Great Storybook?* document to be engaging and inviting to read and to establish a look and feel that reflected the creativity and dynamism of the workshop and the storybooks themselves. Rather than publishing a text heavy document, the project used a designer to create the look and feel described above. As a result, the resource has been received with significant enthusiasm due to its inviting nature.

## Publisher Engagement

**Lesson 1: Beyond training on how to develop storybooks, publishers would also benefit from business development training.** At the end of the project, publishers expressed interest in digital marketing training and support on setting up websites to reach more customers.

After the REACH storybooks were developed, the project tried to register the storybooks on Pukupedia – a South African online catalog of books for children established by a Puku Books – to increase their exposure. However, without an online ordering platform, not all publisher's books could be registered. Further, training on digital marketing would have enabled publishers to market the books during pooled procurement. From these experiences, the project realized that supporting publishers in business development during the project would help ensure that after publishers develop the storybooks, they are equipped to get them on the market.

**Lesson 2: Selecting small publishers can result in highly engaged partners even if they do not have storybook publishing experience.** The final REACH partner publishers were involved, committed, and shared the project's vision to increase the supply of African-language storybooks. Most saw the capacity building and learning as key goals for their publishing house, and the money as a bonus. While the management fee was not payment for their time but was payment to help cover expenses (such as administration, collecting manuscripts, arranging meetings with writers), the RBF model also likely encouraged publishers to stay engaged. Publishers came to every project meeting, which was critical to maximize learning for each step of the process. The publishers were also willing to learn about open licensing and try to understand and use new business model, which may have not been possible with larger publishers.

**Lesson 3: Selecting publishers who are already active in their community added an additional layer of impact.** Choosing publishers from local communities brought credibility and authenticity to the books. They also felt pride because the books became a platform for them to promote their own languages. They were eager to provide storybooks in their mother tongues to the next generation of children in their communities.

**Lesson 4: Clarification of who is required to attend meetings is necessary before the project starts.** When senior publishers/owners sent representatives to certain meetings, rather than attending themselves, it was challenging for the representative to absorb the technical information to execute the learnings effectively. Going forward, the project would require attendance of the lead publisher, as the one who will can carry on the knowledge and implement it in their future work.

**Lesson 5: The cascade model is not always effective in relaying complex information.** The project relied on publishers to cascade information down to the writers under contract. With complex information such as open licensing, licensing requirements, and payment terms, writers often needed further clarity or additional information. Instead, for key information

like licensing and payment terms, Room to Read should communicate with both the publishers and the writers at the same time to ensure both have the necessary information.

## Writers' Workshop and Versioning Workshop

**Lesson 1: Supporting writers to retell stories from their childhood can create authentic stories rooted in the community.** The project captured authentic, community, African voices by selecting writers who are native speakers who wrote original stories in their home language. Further, the project led an activity asking writers to reflect on their childhoods—to recall the smells, sights, sounds, and emotions from when they were young. Many felt it was a powerful exercise, and these memories helped some of the writers shape their stories. For example, *Wewe and the Train* was created after the author remembered the sounds of the train from her childhood.

**Lesson 2: All writers should attend the same story-development workshop so that each language group can help the others to version their original stories with quality.** The project had 20 writers, five publishers, one editor, and four Room to Read staff members together at the writers' workshop. This was very effective because writers could provide input into each other's stories as they were being developed, thus ensuring peer feedback on every manuscript. Further, each language group could discuss any cultural or linguistic elements that would not translate well in their language, which would save time and increase the quality of the versioned stories that would be developed later.

During versioning, after a writer versioned a story, their writing partners who knew the same language would review their version to ensure quality. It was helpful that all writers participated in the first writers' workshop because everyone understood the meaning of the original stories.

Further, by the end of working closely together throughout the workshop, participants felt they had established the foundation of a new writing community and they were excited to continue collaborating.

**Lesson 3: The project can save significant time by sharing resources with writers ahead of time and asking writers to have a story drafted when they come to the first workshop.** For the first story draft, the project shared criteria for the writer to consider as they wrote the story, and for versioning, the project shared the *What Makes a Great Translation?* resource before the training. Having writers start the process of brainstorming story ideas before

coming to the workshops help the process move more efficiently to focus on group work, feedback and revisions.

**Lesson 4: Providing writers the opportunity to tell their stories orally can improve the quality of the written story.** Room to Read offered writers the opportunity to tell their stories aloud before working on the written form, which established a positive creative space and helped the workshop participants hear the natural flow and emotion of the stories. This process helped writers and participants to see what parts of the oral stories have not yet been captured in the written stories so that they can revise the stories until they are similarly engaging on paper.

**Lesson 5: Writers can have a wide range of perspectives on what “can” or “should” be included in a story for children, especially when balancing authenticity, culture, and the realities of everyday life.** Writers see a part of their role as upholding culture. Workshop participants had many engaging conversations about what this means, especially as there can be different views on what elements of life that exist around the writers should be exhibited or promoted in a storybook.

Some original stories were on topics such as witch hunting and killing twins. Other stories included what the writers see as a natural part of life: a wife being beaten by her husband, but the story did not treat it as something to be condemned because that is what the writer saw as reality; a boy who wants to be a scientist, but it could not be a girl because that is not what the writer felt was realistic. At other times, writers wanted to include what they saw as a natural part of life in a positive way. One writer wanted to show that albino children are no different in their needs and desires than other children. This writer wrote a story that could be about any Zulu child but asked that the illustrator make the child albino. This story became *The Suitcase*.

**Lesson 6: Selecting writers who are from the provinces and have less professional storybook writing experience can be an incredible opportunity for capacity building, but the workshop approach should be modified.** Partnering with writers who were native speakers of the target languages meant that the project primarily worked with writers who were from the target provinces. The capacity building they received from the project is not something they would normally have access to, and one writer left the writers’ workshop saying they felt they learned more in the four-day workshop than they learned in their three-year university. While some of the writers had experience writing novels , none of them had experience writing children’s storybooks but they left the workshop excited and feeling positive about the new skills they gained.

At the same time, some of the newer writers were intimidated to share their stories in front of the group. When there was group feedback, some writers worried that suggested changes were criticism. All of this improved as the workshop proceeded and writers became more comfortable with each other; however, the project learned that if participants have not had much experience in this type of workshop, it is important to set the context and find ways to create a comfortable space before the workshop begins.

## Open Licensing

**Lesson 1: It takes more time than expected to train on open licensing and to get buy-in from publishers and writers.** The open license framework can feel complex, especially because it disrupts traditional publishing business models. Room to Read needed to take more time than anticipated to explain multiple times both the overall concept and the possibilities that could result. The project spent significant time in a collective brainstorm on ways the publishers could benefit from open licensing. A major difficulty is the newness and counter-intuitive nature of open licensing for traditional publishers who rely on profit to sustain their businesses—there are not yet many examples of publishers who have successful business models based on open licenses. Further, since the 20 original stories were created through a different model than the versions, there was an added layer of complexity in the different ways the CC-BY license was applied to each.

Writers in South Africa are used to getting royalty-based contracts, where they are paid a percentage of every book sold. This can seem like a better deal than a flat fee, as many writers imagine that their books will sell many copies. In practice, this does not often happen (especially with an indigenous language children's book), so a fair flat fee can often be more beneficial to the writer than years of royalties. Publishers may also prefer a royalty model because they do not have to pay authors unless their books sell. In the project, writers who worked on versioning were subsidized one up-front flat fee. Publishers were happy about this, but it was challenging for publishers to cascade this information and they worked hard to make authors feel comfortable with the payment and licensing structure.

**Lesson 2: Open licensing can increase the reach of materials but also disrupts the traditional market model for publishers.** In some cases, open licensing helped to increase the reach of the storybooks developed through the project. Mpumalanga was not able to order copies of the books through pooled procurement, but because the storybooks were open licensed, the project was able to share the print-ready files with them to print on their own. However, since Mpumalanga did not have to participate in pooled procurement to get the

books, publishers were not able to gain profit from the Mpumalanga print-run to continue sustaining their business to fund future book development. On one side, open licensing helped more children get books, and on another side, it disrupted the traditional business model on which publishers rely. The project explored other ways to make publishing African-language storybooks more profitable through pooled procurement, but the project learned additional work can be done to explore alternative business models with publishers based on open licensing.

**Lesson 3: Publishers are concerned (and excited) about how to coordinate future versions of the storybooks.** Since the storybooks are open licensed, all publishers now have access to each other's storybook files. This adds a layer of complexity as publishers determine how to or how not to use each other's files and languages as mission-driven partners on the project, but also as competitors on the market.

Publishers began discussing whether they need to informally agree to not version or print in each other's languages so that there are not future editions of the same book with different logos. On one hand, having the same book in the same language published by two different publishers could be seen like public domain editions of "classics"—many different publishers make money by printing their own editions of local popular or classic books. On the other hand, small publishers "banding together" to support one another's businesses (or at least not compete as overtly as the two editions of the same book) could be seen as a newer kind of business model.

**Lesson 4: Open licensing expands the reach of a project.** Before the close of the REACH Project, Room to Read was contacted by multiple organizations, such as a Chilean NGO looking for quality storybooks in Spanish and a US-based braille publisher, asking for the files so that they can adapt the storybooks. Open licensing creates a clear opportunity for materials to be used by others even outside of the context of the original project.

## One Day One Book Workshops

**Lesson 1: The Book Dash Model created significant capacity building for all participants, even those who did not require any technical capacity building in their areas of expertise before the workshop.** As described in the One Day One Book Workshop section above, all participants gained tremendous knowledge of the storybook development process from start to finish – a rare opportunity for the creators to learn about the process beyond their technical area. Participants also saw a model they could adapt to develop books in a more

efficient way that did not require remote communication and waiting for feedback. Further, illustrators, designers, editors had the opportunity to learn about indigenous language publishing to be better able to support it in the future.

**Lesson 2: The Book Dash Model works well if the project has a pool of professionals interested in volunteering their time.** The Book Dash Model requires all participants to create a book in 12 hours. As a result, there is no time for technical capacity building during the workshop (e.g. there is no time to coach an illustrator on how to illustrate, they must just begin illustrating). For the REACH Project, the project slightly modified the approach since part of the project's mission was to build technical capacity of publishers and writers who are native speakers and from the community of the target languages. While the illustrators, editors, and designers did not receive technical training ahead of time from the project, the project held workshops and closely coached the publishers and writers beforehand. If a project needs to build technical capacity of the book creators, a one-day workshop alone will not suffice.

## Pooled Procurement

**Lesson 1: Publishers were prepared to incorporate some components of pooled procurement into their business models; however, they would need additional support and training to incorporate others.** Publishers were eager to incorporate co-edition printing into their business practices, collaborate with each other to version the REACH storybooks into more African languages, and collaborate with Room to Read to strengthen the business relationship between publishers and the South African government. However, publishers were hesitant to incorporate the sliding scale by language approach. If publishers created versions of their future African-language storybooks into languages like English and Afrikaans (which would not add much cost), they could use sliding scale by language to generate more profit. Publishers did not feel confident in their ability to be competitive against larger publishers and execute on the sliding scale model. Additional training and mentorship is necessary.

**Lesson 2: Relying on the government to contribute to a final project deliverable can be risky since government involvement can be unpredictable.** There are many unpredictable variables that can change a government's ability to be involved as planned. In the case of REACH, a number of barriers arose that prevented the government from participating in pooled procurement.

- **Budget:** Some provinces did not have any budget to purchase books the year of pooled procurement. Although some provinces had funds in their classroom

budgets, most library budgets did not, and classroom budgets were primarily reserved for curriculum materials. For provinces who did have budget for storybooks, the president asked provinces to reprioritize budgets to build new latrines for schools, which the project expects may have affected book budgets.

- **Government Transitions:** The project was able to obtain a commitment to purchase books during pooled procurement from one of the target province's library officials. However, the library official transitioned out of office before pooled procurement launched. As a result, the commitment was lost when the project's point-person left.
- **Open Licensing:** If the government ordered copies through pooled procurement, the larger order would drive printing prices lower for all customers. However, when one target province realized the storybooks were open licensed, they lost motivation to participate in pooled procurement since they could print the storybooks on their own. Their print-run sizes are already large enough to secure a fairly low unit price.
- **Provincial Procurement Systems:** Room to Read learned that each province has different purchasing periods and procurement procedures. Most provinces only purchase books during a small window of time and the window varies by province. Unfortunately, the designated provincial ordering periods did not all align with the REACH Project timeline. Some provinces also have approved vendor and book lists that limit what provinces can purchase and from whom.

The project delayed printing for three months to try to secure provincial orders, but eventually needed to move forward with printing to deliver other pooled procurement customers' books on time. Despite these challenges, the final result was positive. The government remained strongly committed to the REACH Project and their Read to Lead Campaign's vision to create a literate nation. Since the book files were open licensed, the project shared the files with the Mpumalanga government. Mpumalanga provincial government was able to move forward after pooled procurement and funded printing and distributing 38,987 copies of REACH books to additional Mpumalanga government schools.

**Lesson 3: For pooled procurement to be successful, sufficient time must be given for marketing the sale of books.** The amount of time needed for marketing depends on how well known the organization is in their context. In South Africa, Room to Read is known for its literacy work in government schools, but it is not known as a book supplier where the public can purchase books. As a result, the project could possibly increase order numbers if the project timeline was longer to allow for more time to market the books after they were developed and to execute a more robust marketing campaign.

The project also learned that marketing the prices and final PDFs of all the languages earlier is necessary to get more orders. The project announced the pooled procurement opportunity two months before the ordering period and then released the book prices and English-version PDFs (along with a list of the available languages) one week before the ordering period. The project only shared the English-version PDFs because the English versions were finalized first, while the print files for the African-languages were still being developed. However, since the quality of translations can be low in South Africa, customers want to read the stories in the African-languages before ordering. Some organizations also expressed a desire to purchase more, but their annual budgets were already allocated.

**Lesson 4: Planning and implementing pooled procurement requires significant operational and administrative support.** If an organization has not implemented pooled procurement or sold books in the past, it will take additional effort to set up internal systems to do so. In the case of Room to Read, which had not implemented pooled procurement before, the REACH team:

- Established a new accounting system to receive and manager customer payments, including accounts to track customer funds leaving Room to Read to pay the printer;
- Determined how to manage funds collected above the cost of printing the books;
- Researched local accounting laws related to NGOs selling books to determine implications on NGO status and taxes;
- Projected overhead costs of customer books not funded by the REACH Project, printing costs, and distribution costs;
- Set book prices for customers, including procuring a printer and negotiating co-edition printing costs;
- Determined how customers can review book files and place orders (i.e. created a website);
- Created new terms and conditions for selling books;
- Established a new invoicing and receipting system for goods sold; and
- Created a marketing plan and marketing materials.

After pooled procurement launched, the Accounting and Administration teams stayed heavily involved. Accounting managed invoicing, following-up missed payments, sending receipts after payments were received, and sending out any profits to publishers. Very few customers paid for their orders by the payment deadline, and Accounting continued following up with customers six months later until the last payment was received. Further, although the printer delivered books directly to customers, Room to Read Administration stayed closely involved to provide customer service and coordinate with the printer. For example, Administration

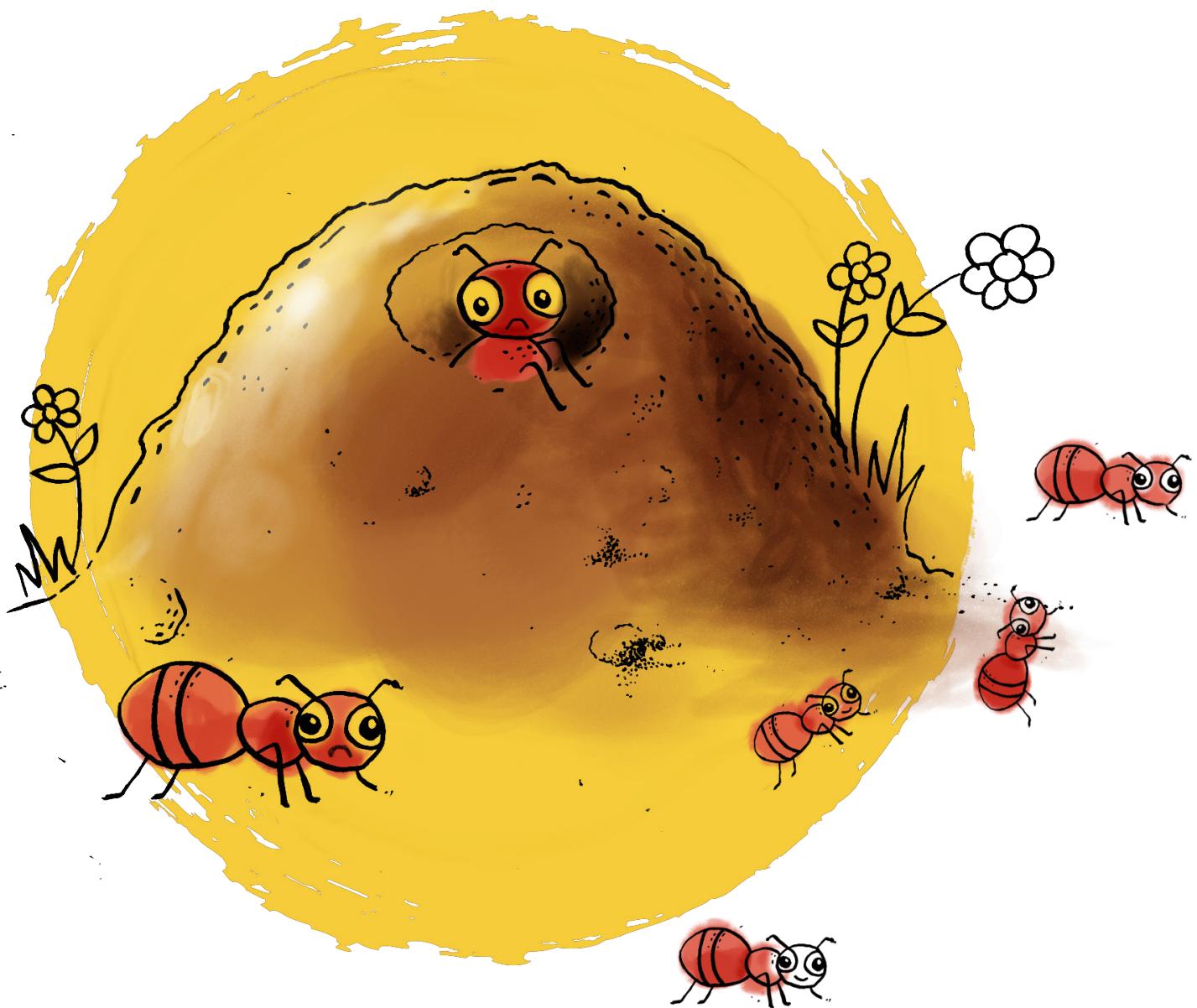
helped to manage issues such as the printer having difficulty delivering to some addresses, customers missing some copies from their orders, and fielding questions from customers about wanting to change orders. Room to Read learned that in the budgeting and planning stage, the project could have allocated more time for Management, Legal, Accounting, and Administration to manage pooled procurement both before and after the two-week pooled procurement period.

While Room to Read recommends allocating sufficient time for Management, Legal, Accounting, and Administration to implement pooled procurement, some administrative costs may be offset by savings from pooled procurement. As described in the Pooled Procurement section above, Room to Read realized a 6% reduction in the unit cost of printing each storybook by increasing the order size through pooled procurement.

**Lesson 5: Using a sliding scale by language approach made the African-language storybooks available to both small and large customers.** This approach proved very successful in that a wide variety of customers (from individuals to more established NGOs) were able to order the African-language books. Further, the African-language versions still generated a meaningful proportion of the profit even though the prices were lower than the English versions. While PASA reported that South African publishers only generated approximately 10% of their profit from all African-languages combined in 2018 (*Figure 5*), 47% of profit from the project's pooled procurement activity was from African-language storybooks. Customers who participated in pooled procurement were generally thrilled about the opportunity to order African-language books, and the shift in which languages generated profit demonstrated that there is a demand for high-quality African language storybooks.

**Lesson 6: Co-edition printing was an effective way to achieve lower unit costs and is a model that publishers can easily absorb into their future business practices.** Many printers in emerging publishing markets do not use co-edition printing when printing orders, or if they do, they use it to save costs for themselves. If the project did not negotiate with printers to employ co-edition printing to reduce the cost for customers, the printing costs would have been approximately 25% higher than the final price. Co-edition printing was successful in lowering costs as well as demonstrating for publishers a practice they could absorb into their own business practices. The project publishers responded enthusiastically to the co-edition printing model since they could easily see how the model would drive printing costs down. Co-edition printing is particularly relevant to South Africa where many publishers print in many languages due to the country's rich diversity.

# RECOMMENDATIONS



From the REACH Project's implementation experience and the lessons learned described above, the project has the following recommendations for others interested in employing a similar project:

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### KEY RECOMMENDARIONS

- When implementing RBF, incorporate an initial payment at the start of the project to help fund the initial activities for those with smaller operating budgets in order to not lose the opportunity to partner with smaller, community-based partners.
  - Invite local representatives to co-facilitate workshops to share ownership of the project, encourage buy-in, and to open opportunities for future collaboration throughout the project.
  - Build in additional time for exploring new business models with publishers if the project requires open licensed material, and incorporate business development trainings so publishers know how to get books on the market for the public to access.
  - When developing stories to be used across languages, have all writers, versioners, and editors come together in one workshop to review each other's stories to gain a common understanding of the stories to ensure the stories maintain their authenticity throughout editing and versioning.
  - Plan to do a thorough open licensing training at the beginning of the project and incorporate refresher meetings each time open licensing concepts are applied.
  - When technical capacity is not required, use the Book Dash Model to create a One Day One Book workshop involving all book creators for a collaborative, fun, and efficient way to create storybooks and expose book creators to the entire book development process.
  - To reduce printing costs and make printed storybooks accessible to the public, implement a pooled procurement model, but incorporate sufficient staff time to execute the model, allow for sufficient marketing time, and incorporate publisher training on marketing and business development.
-

## Results Based Financing

- Apply the RBF model to the payment system between the primary funder and the primary implementation organization for all projects. The RBF model ensures a higher percentage of the funder's resources are spent directly on the beneficiaries.
- For partners with smaller operating budgets or for partners who are implementing costly activities, incorporate an initial payment at the start of the project to help fund the initial activities. This helps to ensure the project does not exclude partners who are from the beneficiary community with smaller operating budget. However, consider what is necessary to give the partner at the start of the project, and how much should be left for an RBF payment at the end to ensure motivation to complete the full scope of work. For example, while the REACH Project paid 90% upfront to publishers because the management fee was not very large and publishers needed some funds to do the work, perhaps if the project left a higher percentage for the final payment, it would have increased the motivation of the one publisher who did not complete the project.
- Research the industry payment norms for each type of partner. For partners who are usually paid after submitting a deliverable, consider ways to incorporate a more complex RBF payment system based on outcomes. Consider providing a base payment to all partners who successfully deliver the key deliverables on time with quality. Then consider incorporating bonus payments for deliverables that are more successful in contributing to positive outcomes. For example, writers whose storybooks are checked-out by more children and are therefore providing more reading practice that can lead to fluency could receive additional bonus payments. Such a structure could further motivate writers to deliver high quality stories. However, the implementing organization should additionally budget for increased monitoring and evaluation work. In this example, the implementing organization would need to be able to assess the impact of each writer's story after the storybooks are delivered to schools.

## Public-Private Partnership

- Brief public-private partnership members on scope and mandate of the project as well as their roles and responsibilities during the opening meeting to ensure they are clear on why they are there and are committed to their role. Present a TOR at

an opening workshop including directorate heads. Make it a participatory process where members can give feedback and agree upon it.

- Identify who in the government would be best suited to help drive the project forward to meet its goals and invite them into the public-private partnership. Align project mission and activities as closely as possible with existing government priorities.
- If possible, choose partner publishers before launching the public-private partnership so that they can engage in activities like developing a resource on storybook quality. Specifically market the public-private partnership to small, indigenous publishers to ensure they are represented.
- Add project budget for government trainings on the recommendations for storybook quality or any other resources that the public-private partnership creates to ensure resources are integrated into government systems. Although this was not part of the REACH Project deliverables, the Room to Read team hopes to do this with other funding in the future.
- Have strong, local representatives co-facilitate workshops to share ownership and encourage buy-in. Incorporating multiple key stakeholders in the leadership adds credibility, strengthens networks, utilizes each partner's strengths, builds a cohesive publishing industry, and ensures multiple perspectives are incorporated in the project design.

## Publisher Engagement

- Choose small publishers with a passion for the mission, experience publishing in the language, and ties to the local author community.
- Rather than relying on the publisher to cascade complex or key information related to licensing and payment to the creators they manage, hold joint meetings to train or relay the information to both parties at the same time.
- If publishers are responsible for paying creators they manage, ensure full transparency between all involved parties on when payments will be paid and the amounts.
- Require that the lead publisher is the one who attends all the project meetings

and trainings. Confirm location of all publishing offices and where the lead publishers sit to ensure they can come to meetings.

- Build in additional time for exploring new business models with publishers if the project requires open licensed material and incorporate business development trainings so publishers know how to get books on the market for the public to access and purchase. Exploring new business models and adding business development trainings for publishers are essential to sustainably grow a country's supply chain.

## Writers' Workshop

- When developing stories to be used across languages, have all the writers and editors come together in one workshop to review each other's stories instead of doing feedback or editing separately.
- When discussing how to find story ideas, have a discussion about culture and the role of the writer. It's important to represent a culture accurately and well, but there may also be some components of reality like violence that the writers should not incorporate in their stories or promote in the books.
- Remind writers that stories can simply be fun and exciting. They do not always have to have a message or moral. Stories can also just motivate children to read.
- Consider what resources can be shared and what writers can complete before the workshop to ensure the time during the workshop is used well.
- Have at least one facilitator per every 6-7 writers, if possible. Having more facilitators allows for more thorough learning and discussions so that writers can then produce their stories with sufficient support. Individual attention is critical.
- Encourage every publisher to send one editor to the workshop if they have one on staff. The editor is very useful to help develop a quality, final story and the workshop can build their capacity as well.
- Ensure all writers speak the bridge language (in the case of the REACH Project, it was English) sufficiently, or ensure there are sufficient staff to support those who do not know the language well.

## Versioning

- If versioners are different people from the writers, ensure versioners are present at the writers' workshop to ensure they have an intimate understanding of the original stories. Doing so will help maintain the authenticity in the versions.
- Closely involve the editors in the versioning process. If the implementing organization trains both the publisher and the editor on versioning, they can deliver the training to their writers together. Having the editor involved throughout the process increases quality assurance.
- Ensure the versioners properly understand the differences between versioning and translating. Once they have a solid understanding of versioning, they do it much better and there is less work for reviewers later. Ensure there is both theory and sufficient practice time in the training before versioners start doing their work.
- Create a manual or reference guide such as *What Makes a Great Translation?* for versioners to reference after the training as they are working on versioning stories.

## Open Licensing

- Include writers (or any creators who are working for the publisher) in open licensing trainings with publishers instead of expecting publishers to cascade the information down. This will ensure all participants have the same information and the implementing organization has a clear idea whether participants fully understand and are comfortable with the licensing arrangement.
- Plan to do a thorough open licensing training at the beginning of the project and incorporate refresher meetings each time open licensing concepts are applied. It takes more than one meeting for participants to grasp the licensing concepts and then understand how the materials in the project will utilize the license. Discuss with participants how they can or how they want to use each other's material created through the project after the project ends as well.
- Share as many case studies of successful open licensed children's publishing as possible, and try to inspire innovative thinking.

- Towards the end of the REACH Project, the partner publisher Abantwana fully embraced the concept of open licensing. Abantwana is exploring the idea of paying royalties to other publishers who create material based on their own sense of collaboration and business ethics rather than because the law requires it. See more details in the Conclusion of this report.
- The most prominent example of successful open licensing - Pratham Books' Storyweaver project, which effectively models how digital exposure of print books can grow print sales - uses open licensing to promote traditional sales print practices. Open licensing and digital availability of open licensed files might have some powers to change the way publishers operate—but this will require real support for new business experimentation, not only content creation.
- Consider a project that funds remixing and reprinting of existing CC-BY content, instead of creating new content. It would be interesting to propose a pilot in which a group of publishers selected open licensed content they felt they could sell in new or traditional ways, and then to brainstorm, support, and provide micro-grants to attempt such innovations. Such a project would demand that publishers create and pilot some new business models, and would be a huge contribution to the space. As the REACH Project has demonstrated, new thinking around the publishing business and open licensing is possible, but it requires training, support, and open-ended encouragement for publishers to experiment.

## One Day One Book Workshops

- Use the Book Dash Model to create a One Day One Book workshop involving all book creators for a collaborative, fun, and efficient way to create storybooks and expose book creators to the entire book development process. Use the model only when technical capacity building is not required, or if required, build in additional trainings before the One Day One Book workshop.
- Add in a commitment time (e.g. two weeks) after the workshop when the creators will work on tweaking the books based on feedback. This is especially important for illustrations – as noted above, the illustrator is under the most pressure on the day and by the end of the day some of the artwork quality may suffer as illustrators try to finish their work before the deadline. It is thus necessary to give illustrators and others an opportunity to re-visit and adjust their work.

- Writers and editors should begin discussing story ideas and draft stories before the One Day One Book workshop if possible to allow for more time for illustrators and designers on the workshop day. Illustrators and designers can also be included on the communications so that they too can see how the story is developing and can start visualizing how they want to approach the book.
- If circumstance permit, involve the editor throughout the whole process: from selection of writers, the writers' workshop, the One Day One Book workshop, versioning workshops, and checking the proofs before printing. The project noticed that the editors had an important role to play in each of those phases of the development process, and their contributions added significant value.

## Pooled Procurement

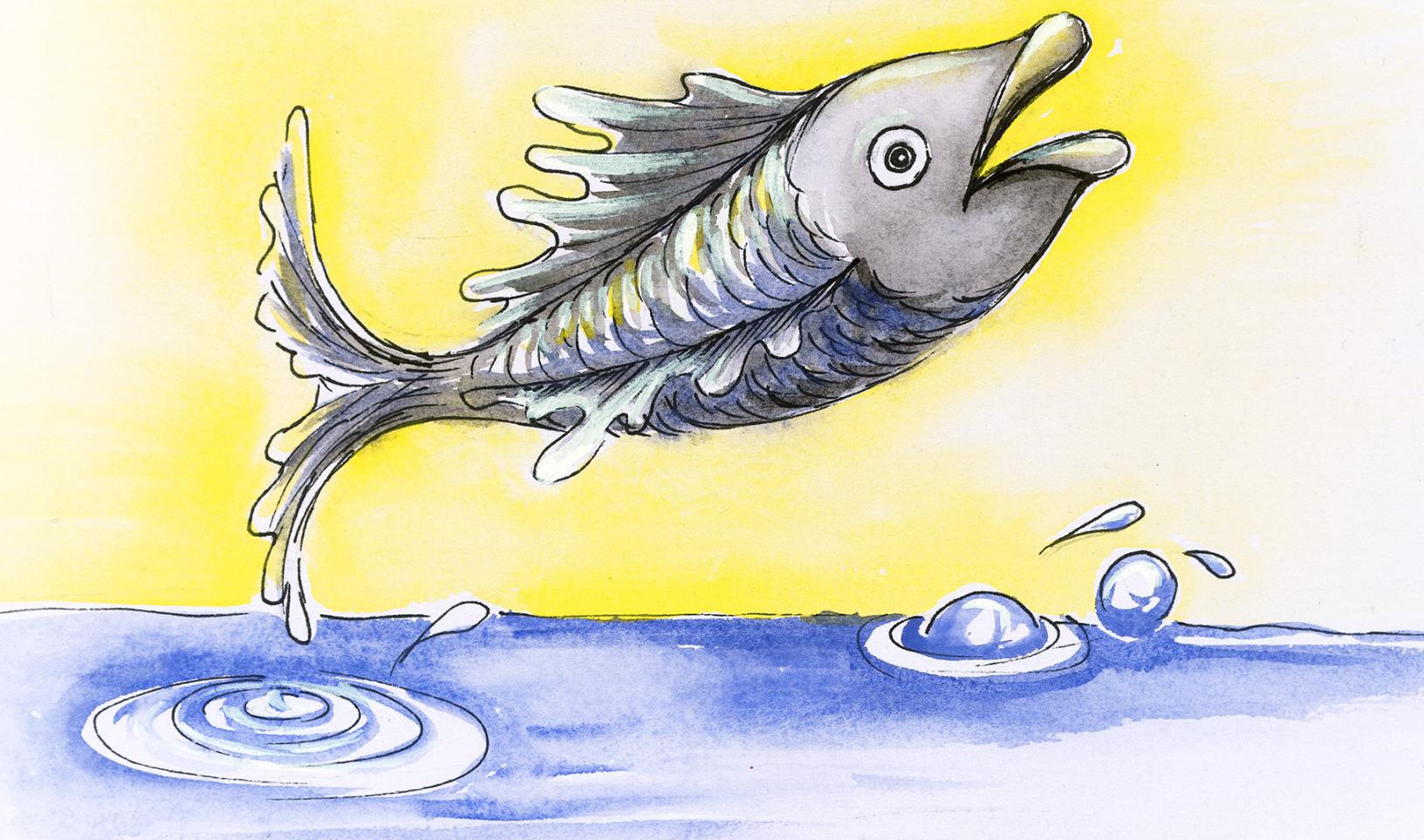
- For organizations who have not supplied books to the public in the past, build in extra preparation and closing time to the pool procurement period for significant support from accounting, administration, and operations teams for activities such as setting up internal accounting systems for book sales and invoicing, providing customer service, and collecting payments.
- For organizations who have not supplied books to the public in the past, build in extra marketing time (approximately 4 months). The extra marketing time gives the implementing organization time to train publishers on digital marketing, gives customers time to identify available budget that they can spend on books, and also gives the implementing organization time to execute a more robust marketing campaign. If publishers are only familiar with marketing printed copies, add in time to print sample storybooks for each publisher to use during the marketing period. They can use the printed copies with their usual customers, as well as use their digital marketing training to reach more.
- Complete all language versions of the storybooks ideally before the marketing campaign so that during the marketing campaign, the public can review the final PDFs in every language.
- Announce the book prices at the same time as releasing the final PDFs, if possible. When advertising the price of the book, understand if the market price usually includes VAT/tax or not. Market the price accordingly. Set the prices using a sliding scale by language approach to keep the indigenous language books affordable and generate more profit from popular languages.

- If government participation in pooled procurement is a key part of the implementing organization's project, align the pooled procurement timeline with government procurement cycles. Keep in mind that different provinces/states/regions may have different purchasing periods and requirements.
- Build time into the implementation organization's project to meet any requirements the government may have before they can order books from the project. For example, apply to become an approved vendor or register the final storybooks on the approved book list so that the government and schools can buy them. Register the publishers (and not just the project) to ensure they can continue providing books to the government after the project ends.
- If the implementing organization plans on the government participating in pooled procurement, do not add the number of books the implementing organization expects the government to purchase to the project deliverables since it is outside of the project's control. Instead, set the number of books that the project can fund as the committed minimum number. If the government is able to purchase books, the distribution numbers will increase beyond the minimum.
- As described in the Publisher Engagement recommendations, build time into the project to train small publishers on business development, such as online marketing and establishing a website.
- Build more time into the project timeline to incorporate additional publisher support on pooled procurement areas that may be harder for them to implement, such as sliding scale by language. If possible, incorporate multiple rounds of pooled procurement. The lead organization can run pooled procurement the first time. The second time, publishers can take more of a lead role to gain confidence in employing pooled procurement on their own after the project ends.
- Budget to print additional, free copies of the storybooks for the project publishers to keep. If the implementation organization is working in an emerging market, small publishers may not have available budget to print copies of their own books for their business to use after the project ends.
- Use an order form that allows the implementation organization to create a dropdown menu in the field where customers enter the number of books they want to order. For example, if customers can only order in increments of 50, create a dropdown menu with only options in those increments. This will prevent issues

with customer orders and significantly reduce the amount of follow-up work.

- Collect funds from customers before printing. Only print book orders that have been paid for to reduce the amount of follow up work to collect payments after pooled procurement and reduce the risk of a customer failing to pay for their printed copies.
- Choose an established printer that has the proven ability to distribute to a large number of pooled procurement customers.
- Negotiate with printers to provide the implementation organization with printing quotes based on co-edition printing. Ensure the printer knows how to do co-edition printing and meet with them to explain it if needed.

# Conclusion



Within a few months of distribution, children in the government schools are reading their new 46,300 copies of the REACH storybooks. Room to Read's title recognition survey and library checkout results (*Appendix 3*) show that children are developing a degree of engagement and familiarity with the storybooks. A version of every original storybook has been checked out of the school libraries by students, and on average, students of each sample library checked out a REACH storybook more than 300 times during the month, or slightly over ten times per day. Through pooled procurement and open licensing, other children throughout South Africa and more government schools have access to 55,520 additional copies of the storybooks.

As the executive summary noted, REACH partners are moving forward with their new knowledge to impact South Africa's storybook supply chain. Limpopo Faces has begun publishing 25 of their own storybooks, and REACH writers have begun creating new content to submit for national publications. Further, Abantwana Publishers is taking significant strides towards impacting the supply chain by adding new content to the market and exploring new open licensing business models (*Figure 6*).

At the close of the REACH Project in South Africa, Abantwana Publishers stated the following about their new perspective on open licensing:

*"As a publisher, the project allowed me to enter a market which is not contested much in South Africa. Which means when the competition starts acknowledging these markets, the publisher would have a market edge through contacts, network and experience. Open licensing helps with this market edge over the big publishers."*

**-Siphephelo Zuma, Abantwana Publishers**

*Figure 6 - Abantwana Publisher's Application of REACH Project Learnings*

Since learning about storybook development, pooled procurement, and open licensing through the REACH Project, Abantwana Publishers has taken significant steps to apply this knowledge to strengthen the business and the publishing industry. Abantwana:

- Aims to present all the REACH storybooks to the provincial government in their area (Gauteng). If Gauteng purchases copies, Abantwana will pay the other publishers a 15% royalty on the books they sell in publishers' languages. This means that the other publishers suddenly have a presence in Gauteng, an area in which they would not otherwise sell, and Abantwana has a significant increase in their catalogue. While paying royalties to the original creators is not required by the open license, Abantwana hopes the other publishers will extend a similar courtesy in the provinces where they are based.

- Proposed an additional pooled print run to the other REACH publishers, but this proved difficult as it requires capital from the other publishers. Abantwana could have printed 40,000 copies of the books for R 300,000 split five ways, but the R 75,000 was too high a price tag for the small publishers.
- Developed new editions of all 120 of the storybooks. Abantwana then aligned the new editions to South Africa curriculum based on learning outcomes in both life skill and language, in both indigenous languages and home languages. After which, Abantwana licensed the new content under the CC-BY-NC license in order “to limit publishers and writers amending the works and losing the academic approach to the titles.”
- Presented on their REACH Project experiences at the USAID webinar on Open Licensing Business Models sponsored by the Global Reading Network and its partners, the Global Book Alliance and All Children Reading in June 2019.

The REACH Project has provided South African children with new, exciting storybooks in their home languages with stories from their own communities. The REACH partners, such as publishers and writers, are also better equipped to continue supplying such storybooks to children beyond the close of the REACH Project. With these results, Room to Read aims to strengthen the reading-for-pleasure culture among young readers in South Africa.

In a closing survey, the publishing partner Sharp Shoot stated:

*“Please let it not end here. I am especially making a request that this [type of project] should be popularized [to] let the publishers grow.”*

**-Peter C. Maidu, Sharp Shoot**

Upon the close of the REACH Project, partner publishers shared an immense pride for the work they completed over the course of the two-year project as well as excitement for the future. At the same time, there was a resounding desire for more. Room to Read would love to explore further strengthening these partner publishers in South Africa with the World Bank. Room to Read sees an opportunity to pilot an initiative where publishers identify existing CC-BY content to revise and explore ways they can innovative new business models to use the open-licensed content. Room to Read would also love to explore partnering with the World Bank to replicate this project in other countries so that this project and lessons learned can impact storybook supply chains globally.

Room to Read would like to thank the Results in Education for All Children trust fund at the World Bank and the Global Book Alliance for the opportunity to implement this project.

**To order printed copies of the REACH storybooks directly from the publishers to support the South African publishing industry, please contact:**

**Abantwana Publishing**

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Bramley, Sandton, 2090

**Limpopo Faces**

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081 514 2337  
Postnet Suite 43, P.O. Box 5981  
Polokwane North, 0750

**Balaodi Publishers**

Diphete Bopape  
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015 297 7967  
76 Hans Van Rensburg St  
Polokwane, Limpopo, 0699

**Sharp Shoot**

Peter C. Madi  
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015 297 8416  
Shop 3 A, 4 Devenish St  
Polokwane, 0699

**Indwa Publishers**

Matthew Jabulani Mgadi  
011 942 5389  
Meredale, Johannesburg  
South, 2091

# APPENDIX



## Appendix 1 - Empowering African Voices Brochure

Room to Read is proud to be collaborating with the Department of Basic Education, with the Director General's office leading the project.



For more information, please  
contact Naomi Mositsa:  
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## Empowering African Voices



Building the Children's Publishing  
Industry in Indigenous Languages



Room to Read (RtR) and the REACH for Reading Trust are facilitating this two-year project to pilot innovations in publishing high-quality children's storybooks in indigenous languages in South Africa.



## The Goals:



The project seeks to stimulate African cultural industries and promote reading in indigenous languages, by funding creative entrepreneurial approaches to publishing.



It is focused on storybooks rather than 'learning to read' textbooks. Although textbooks are essential, stories and illustrations are the key to motivating children to read. According to Bibi Bakare-Yusuf of Cassava Republic Publishers in Nigeria:

In contrast to their Western and Asian counterparts, many African children grow up without ever having seen, let alone owned, beautiful, well-illustrated books which inspire them to a life of reading, beauty, learning and curiosity for the world. With a youthful population, there is a pressing need to produce more content that will invite children to dream, to question, to imagine, to look to the past with a view to understanding the present and provoking the future.



## The Steps:



Between November 2017 and December 2019, the project will:

- > Develop of national quality recommendations for children's storybooks. The recommendations are intended for use by publishers for book creation and purchasers for collection development.
- > Engage with new and emerging publishers and community authors and illustrators to publish original story books in each of five indigenous languages: isiZulu, Tshivenda, Sepedi, Siswati, and Xitsonga. Each of the 20 original storybooks will then be versioned into the other languages, for a total of 100 unique storybooks.
- > Distribute these storybooks to school libraries at government schools in Limpopo, Mpumalanga, and KwaZulu-Natal, and make them available to other interested purchasers at a low cost.

## Appendix 2 - Pool Procurement Announcement Flier

**Exciting and child-friendly storybooks for early readers**

**JULY ONLY**  
PLACE YOUR ORDER

**TWENTY STORYBOOKS FOR LEARNERS IN GRADES R-3 IN SEPEDI, SISWATI, XITSONGA, TSHIVENDA, AND ISIZULU.**

Low prices available from pooling all printing orders together into one large print order. If interested in obtaining these indigenous language storybooks, contact: [Doreen.Mojapelo@roomtoread.org](mailto:Doreen.Mojapelo@roomtoread.org).

*Books created by South Africans for South Africans.*



*Book development was led by Room to Read in partnership with Fire & Lion and African Storybook. Books were created by local authors, illustrators, designers, and publishers, and funded through the Results in Education for All Children (REACH) trust at the World Bank and the Global Book Alliance, and supported by the Department of Basic Education.*

## Appendix 3 - Storybook Results from Government Schools

### Number of Available Copies per School/Class/Student

Province	Total schools	Total classes	Total children	Total books	Avg bks/schl	Average bks/class	Average bks/student
Kwazu-Ilu-Natal	35	245	20,196	<b>7,000</b>	200	28.6	.35
Limpopo	155	1,085	84,210	<b>31,000</b>	200	28.6	.37
Mpumalanga	41	287	20,050	<b>8,300</b>	202	28.9	.41
Overall	<b>231</b>	<b>1,617</b>	<b>124,456</b>	<b>46,300</b>	<b>200</b>	<b>28.6</b>	<b>.37</b>

Through the project, Room to Read distributed a total of 46,300 REACH-funded books to a total of 231 schools across three provinces.

Book distribution varied according to the total enrollment of the school, with approximately one book distributed for each 2.7 children. On average 200 books were distributed to each school.

Note that the figures above for children and classes reflects the full enrollment of each school. Grade-specific enrollment data were not available; however, in practice since the materials are targeted primarily at children in grades R – 3, the children reading at these grade levels are expected to benefit most from access to these children. (Were enrollment data available for these grades only, this would result in a decrease in the total number of children and classes in the table above, with a corresponding increase in the average number of books distributed per child and per class.)

### Title Recognition Survey Results

A sample of 128 children in grades two and four participated in an exercise in which they were given a list of book titles, including all the REACH titles as well as a number of “fake” titles, and asked to identify which of the listed books were present in their libraries. Children performed significantly better than chance in this exercise ( $p < 0.0001$ ), suggesting that within a few months of their distribution children are already developing a degree of engagement and familiarity with these books.

## Library Book Checkout Results

One month of detailed checkout data were analyzed in a sample of 16 libraries. This analysis revealed that on average, students of each library checked out a REACH title more than 300 times during the month, or slightly over ten times per day. Individual titles varied somewhat in their checkout popularity, from 8.6 checkout instances per month for *The Lonely Pickle Tree* to 27.5 checkout instances per month for *Pig's Wedding*. Checkout was highest among grade-five and grade-six students, and lowest among grade-one and grade-two students—unsurprisingly given that the latter group is still in the early stages of learning to read.

### Checkout Instances per Month (average for each school)

Book Title	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Totals
The Lonely Prickle Tree	0.4	0.2	1.1	1.6	1.9	1.8	1.6	<b>8.6</b>
The Most Beautiful Animal	0.5	1.4	0.9	1.6	1.3	1.8	1.3	<b>8.9</b>
The Hungry Ant	0.5	1.5	0.9	1.8	1.6	1.8	1.8	<b>9.8</b>
Tommy the Greedy Cat	0.3	1.3	1.3	1.4	2.6	2.0	1.8	<b>10.6</b>
The Suitcase	0.3	0.9	1.4	1.6	2.4	2.4	2.4	<b>11.4</b>
Madam Hats Can't Find her Hat	0.3	1.3	1.3	1.8	2.7	2.6	2.2	<b>12.1</b>
Fish Finds a Friend	0.3	0.4	1.8	1.8	2.4	2.7	3.4	<b>12.8</b>
Nomsas First Day	0.1	0.9	1.4	3.1	3.2	2.9	3.6	<b>15.1</b>
Polecat	0.1	0.4	2.7	2.4	3.5	3.1	3.1	<b>15.4</b>
The Promise	0.0	1.0	1.9	2.6	3.9	3.4	3.4	<b>16.3</b>
The Birthday Present	0.4	2.4	2.4	2.4	3.6	3.0	3.0	<b>17.3</b>
Hide and Seek	0.1	1.8	2.3	2.7	4.1	3.6	3.1	<b>17.6</b>
Lion and Warthog	0.6	1.1	2.4	2.0	4.7	4.4	3.2	<b>18.5</b>
Nono Finds a Friend	0.0	0.1	2.2	3.1	5.6	4.3	3.6	<b>19.0</b>
Nyamvula is Thirsty	0.3	1.6	2.8	3.3	4.4	3.7	3.6	<b>19.6</b>
Wewe and the Train	0.8	2.4	4.1	3.0	4.4	3.8	2.2	<b>20.6</b>
The Two Naughty Mice	0.2	2.6	2.9	3.9	5.5	3.6	3.1	<b>21.8</b>
The Greedy Dog	0.4	2.1	3.6	4.9	4.9	5.0	3.1	<b>24.0</b>
Langutani's Trick	0.3	2.9	3.3	4.9	5.9	4.3	2.6	<b>24.1</b>
Pig's Wedding	0.5	5.0	4.5	4.8	6.1	3.9	2.7	<b>27.5</b>
<b>Totals</b>	<b>6.3</b>	<b>31.3</b>	<b>45.1</b>	<b>54.6</b>	<b>74.8</b>	<b>64.1</b>	<b>54.8</b>	<b>330.9</b>