

CHAPTER 1

INTRODUCTION AND ORIENTATION

1.1 THE AIM OF THIS CHAPTER

The aim of this chapter is to outline the intended study in which an attempt will be made to identify contextual¹ factors within secondary schools that influence the implementation of HIV & AIDS prevention programmes². A more detailed investigation with regard to aspects such as the views and experiences of, for example, principals, members of school management teams and teachers³, will also be undertaken.

1.2 INTRODUCTION AND ORIENTATION

In order to provide a clear exposition against which this study must be read, the following discussion aims at informing the reader with regard to the background and status quo that gave rise to the necessity to investigate the issue of the implementation (or lack) of HIV & AIDS prevention programmes in schools.

Epidemics differ from one another and can reveal unique characteristics with regard to the speed and extent of their development and growth (Van Rooyen 2001:12). The HIV & AIDS epidemic⁴ in Europe and America differs greatly from, for example, the South African epidemic. A typical difference in this regard is, for example, the infection rate among the 14-29 year age group

¹ The term 'contextual' refers to the specific circumstances or background in which a particular event occurs (Reader's Digest Universal Dictionary 1989:343). For the purposes of this study the term 'contextual' will refer to the specific circumstances or background in a school that influence the implementation of HIV & AIDS prevention programmes.

² Refer to paragraph 2.8 in Chapter 2 for an analysis of the concepts used in this study.

³ For the purposes of this study the term 'teachers' will refer specifically to teachers who teach Life-Orientation as a subject.

⁴ Regarding the use of the words 'pandemic', 'epidemic', and 'endemic' refer to paragraph 2.2.1.

that is much higher in South Africa than in Europe and America (UNAIDS 2006:7). Other unique characteristics with regard to the South African situation are an urban bias, with urban:rural figures of 5-10:1; gender differences – a male:female ratio of 0.7:1; a disproportionate effect on the middle class early in the epidemic, but an even distribution amongst economic groups as the epidemic progresses; and an increasing number of HIV & AIDS orphans (UNAIDS 2006:7-12). Having taken cognisance of these characteristics, and especially the fact that the above-mentioned age group represents learners in South African secondary schools (grades 8 – 12), I continuously asked myself the following question: *What are secondary schools⁵ doing to address the situation?*

South Africa is regarded as a Stage 3 country⁶ with regard to the stages of an epidemic (UNAIDS 2002b:3). The HIV & AIDS epidemic is currently spreading more rapidly in South Africa than ever before (Statistics South Africa 2006:3), institutions are closing down, public services are suffering, the death rate is rising significantly, an increasing number of children are orphaned and terminally ill (UNAIDS 2002a:8; Department of Health 2005:62), and some of the isolated villages in rural areas are in a process of vanishing (UNAIDS 2002a:7). These findings can be ascribed to the unique socio-economic problems that prevail in this part of Africa, such as under-development, poverty, unhealthy life styles, high-risk behaviour patterns, social chaos, moral deterioration, natural disasters and violence (UNAIDS 2002b:3).

Having interpreted the above facts and statistics, I am of the opinion that the following factors may further contribute to the disastrous level of the HIV & AIDS epidemic in South Africa:

⁵ For the purposes of this study any reference to “schools” in the text will mean “secondary schools”.

⁶ In general an epidemic progresses through three sequential stages. Although different epidemics might reveal the same progressive pattern, each epidemic remains unique with regard to the speed and extent of its development and progression (UNAIDS 2002b:3).

- A lack of government commitment, infrastructure and resources.
- A hesitancy and often overt refusal of School Governing Bodies (hereafter referred to as SGB's), school principals, managerial teams and/or teachers to implement or become involved in the prescribed and compulsory governmental HIV & AIDS programmes, regarding the epidemic as "someone else's problem".
- Insufficient teacher training.
- Opportunistic fly-by-night "experts" on, and presenters of HIV & AIDS programmes to young learners, often without any norms and values.
- Presenters who do not know the difference between moralistic (judgemental) presentations on the one hand, and on the other hand values and ethics education that is based on the Manifesto on Values, Education and Democracy (Department of Education 2001c:1), and on other relevant universal values such as the value of privacy, the value for life, and self-control.
- Personal resentment towards presentation of prescribed content in schools.
- Lack of the necessary understanding of the seriousness of the disease.
- Lack of a personal commitment to change individual behaviour.

In South Africa, the HIV & AIDS epidemic has already reached the stage of "generalised infection" which implies that more than one percent of the population is infected with HIV & AIDS and that the epidemic shows no signs of declining (UNAIDS 2006:17; Statistics South Africa 2006:4). In this regard a National HIV Survey revealed that approximately 11,1 % of the total population (5.5 million people) were already living with HIV & AIDS (Statistics South Africa 2007:2; UNAIDS 2007:9). More people are infected every three days in South Africa than the total number of deaths on 9/11 in New York (UNAIDS 2007:9).

The total number of children that are HIV infected in South Africa is estimated at 240 000 (Department of Health 2005:64). The highest HIV infection rate in

South Africa occurs among the age group 15-24 years. An estimated 18.8% of people between the ages of 15-49 years are currently living with HIV & AIDS, while 70% of all deaths in this age group are ascribed to AIDS. In South Africa HIV & AIDS will have killed two thirds of the adolescents that are currently 15 years old, by the year 2015 (Statistics South Africa 2007:2).

1.3 RELEVANCE OF THIS STUDY

Keeping the above facts in mind, it appears that the rate of infection is increasing and that the HIV & AIDS epidemic, with no evident cure in the near future, is mounting its impact.

Experts commonly hold the view that HIV infection can be prevented through education and positive changes in sexual behaviour (Department of Education 2000:39; Kelly, Parker & Oyosi 2002:20; Badcock-Walters & Whiteside 2003:3; Department of Education 2003d:13). Even though a significant number of education programmes are being presented to young children and adults in schools and society in South Africa (in this regard refer to paragraph 2.2), research indicates that the HIV infection rate is increasing. Although prevention strategies have been in place since 2001 (UNAIDS 2002b:47), the prevalence rate remains unacceptably high in South Africa, while research indicates that a mere 18% of schools are following a Sexuality Education programme with HIV & AIDS as a core component (Rademeyer 2003:2; Mathews, Boon, Flisher & Schaalma 2006:389).

I find it unacceptable that schools are not following the prescribed programmes and I am convinced that this fact is an outcome of one or more significant causes. Do SGB's, management teams and parents not consider the programme to be important? Don't they realise that it is a matter of life and death? Or can it be that the teachers do not feel competent and sufficiently trained to deal with such sensitive matters in the classrooms? Can it be that they do not feel comfortable with their own sexuality or perhaps

have unsolved issues that could prevent them from being open and honest with the learners? What are the contextual factors that influence the implementation of HIV & AIDS programmes in schools? Considering the state of affairs, isn't it high time that research be undertaken to identify, explore and explain the contextual factors that negatively influence the implementation of HIV & AIDS programmes in schools? I am convinced that such a study can contribute to the alleviation of this negative state of events!

The spread and the rising incidence of HIV & AIDS are damaging our society and our education system. Many schools are already experiencing great difficulties, and school communities no longer depend on healthy learners, stable families, competent teachers or a strong economy (Department of Education 2005:64). If the infection rate continues to escalate and the projected mortality rates, especially among young people (adolescents), become a reality, it may have further devastating long term consequences for South Africa.

In view of the specific nature and prevalence of the disease, as I have discussed above, I make the assumption that the current strategies for preventing the high rate of HIV & AIDS infection amongst the 15-24 year old age group are not successful, or are not successfully being implemented as far as school programmes are concerned.

1.4 STATING OF THE RESEARCH PROBLEM

It is within this framework that teachers are confronted with the escalating threat of HIV & AIDS. I am convinced that for HIV & AIDS education to be effective, the curriculum must include more than knowledge and information. In their study, Palmer, Boardman and Bauchner (1996:301) found that even though children seemed to have a considerable amount of knowledge with regard to HIV & AIDS, they were unable to apply this knowledge by displaying appropriate behaviour when presented with hypothetical situations

in class. These authors propose that HIV & AIDS educational programmes should encourage children to think and to discuss issues, thereby enabling them to incorporate knowledge into future behaviours.

According to Kistner, Eberstein, Quandnago, Sly, Sittig, Balthozor, Castro and Osborne (1997:294), HIV & AIDS education programmes need to be carefully designed to ensure that the programmes are tailored to meet the needs of children in respect of their ages, races and communities. They found that these variables also influence children's attitudes toward persons living with HIV & AIDS. They further state that another potential influence on children's beliefs with regard to HIV & AIDS is their parents' beliefs and attitudes with regard to HIV & AIDS and people living with the disease.

Although prevention strategies have been in place for several years, the prevalence rate remains unacceptably high in South Africa. What can be done? Why are schools not implementing the prescribed programmes and policies? What is hindering the actual implementation of programmes and policies?

With these questions in mind, the research problem of this study can be formulated as follows: **In what manner do contextual factors influence the implementation of HIV & AIDS programmes in South African schools?**

The primary research question, as stated in the previous paragraph, can inter alia be differentiated into the following secondary questions:

- What are the expectations of the Department of Education (as stipulated in the relevant policy) with regard to the HIV & AIDS programme and the implementation thereof in secondary schools?
- What significance do the School Governing Body, the school management team and the teachers attach to the implementation of the HIV & AIDS

programme and to what extent are opportunities created and resources made available in order to adequately implement the programme?

- ❑ How do school management teams and teachers perceive their respective responsibilities with regard to the implementation of the HIV & AIDS programme in their schools?
- ❑ What are the attitudes and lived-experiences of teachers with regard to the practical implications of the HIV & AIDS programme in the classroom?

1.5 THE PURPOSE OF THIS STUDY

In the light of the primary and secondary research questions formulated above, the primary aim of this study will be to identify and investigate contextual factors within secondary schools⁷ that might influence the implementation of HIV & AIDS programmes, by inquiring into the experiences of teachers that are responsible for implementing HIV & AIDS programmes in schools.

In order to conduct this research and to achieve the primary aim of this study as formulated above, it is necessary to answer secondary questions. These questions can be translated into the following secondary aims of this study:

- ❑ To determine what the expectations of the Department of Education are with regard to the implementation of HIV & AIDS programmes in schools.
- ❑ To determine the significance that the SGB, school management team and teachers attach to the implementation of an HIV & AIDS programme.
- ❑ To determine to what extent opportunities are created, and resources made available, in order to implement an HIV & AIDS programme in the school.
- ❑ To ascertain the manner in which school management and teachers perceive their respective responsibilities with regard to the implementation of an HIV & AIDS programme in their schools.

⁷ For the purposes of this study, certain secondary schools in a demarcated semi-urban area (Soshanguve) will be selected. (In this regard also refer to paragraph 1.6).

- To determine the attitudes and lived-experiences of teachers with regard to the practical implications of the HIV & AIDS programme in the classroom.

1.6 DELIMITATION OF THIS STUDY

This study will focus on the identification and investigation of the contextual factors that influence the implementation of the HIV & AIDS programme (as part of the Life Orientation Learning Area) in Soshanguve.

1.7 EPISTEMOLOGICAL COMMITMENT AND PARADIGMATIC PERSPECTIVE

In order to provide a general orientation and essential background with regard to the rest of my study, I shall now provide a brief delineation of my selected paradigm, methodological choices and methodological process. An elaboration on these aspects is done in Chapter 3.

1.7.1 Knowledge claim

I regard science as a search with a view to understanding a phenomenon and believe that there is no single truth to be discovered (Mouton 2001:138). People ascribe meaning to 'own truth' in their quest to understand phenomena. I therefore regard knowledge to be based on two epistemological theories, namely interpretivism and constructivism (Donald, Lazarus & Lolwana 2002:173; Sexton 1997:3).

Although epistemological research has the comprehensive goal of searching for knowledge that is truthful, I agree with Mouton (2001:138) who warns that it is impossible to produce scientific results that are absolutely true for all times and contexts. I am also of the opinion that all knowledge and "truths" are relative to the contexts of their application. I shall therefore focus on

generating knowledge that is truthful to the contextual realities within the social realm of education that influence the implementation of HIV & AIDS programmes in secondary schools.

1.7.2 Paradigmatic perspective

I shall conduct this study within the constructivist and interpretivist paradigms and therefore construct my own understanding from the understanding with which the participants construct their reality. According to McMillan and Schumacher (2001:396), the constructivist philosophy assumes “reality as multilayered, interactive, and a shared social experience interpreted by individuals”. With regard to this study, the school in society and the manner in which it succeeds in the implementation of HIV & AIDS prevention programmes, will be viewed as an important role-player within the multilayered reality of society. Donald *et al.* (2002:174) state that constructivism is a view that sees knowledge as actively constructed by individuals, groups and societies, and not merely as something that is simply transferred.

Constructivism means to interpret or analyse in a manner that places emphasis on a person’s active creation and building of meaning and significance (Sexton 1997:4). In view of the aim of identifying, exploring, describing and explaining contextual factors that influence the implementation of HIV & AIDS programmes, constructivism may provide a framework for interpreting and analysing the manner in which the teachers respond to the consequences of contextual factors that negatively impact on implementation efforts in schools. According to Schwandt (1998:223), interpretivists emphasize the permanence and priority of the real world of first-person, subjective experience. In this study this refers to the experiences of teachers that are responsible for implementing HIV & AIDS programmes in secondary schools.

Schwandt (1998:222) further clarifies the manner in which research is integrated within the constructivist and interpretivist paradigms. The constructivists and interpretivists presume that, to understand this world of meaning, it must be interpreted. The researcher must clarify the process of meaning construction and shed light on what and how meanings are embodied in the language and actions of social actors. To prepare an interpretation is to construct a reading of these meanings; it is to offer the inquirer's construction of the constructions of the actors one studies (Schwandt 1998:223).

In view of the above it is presumed that teachers and school management teams construct their own meaning with regard to the implementation of HIV & AIDS programmes in their school's context, based on their interpretations of what it entails to implement such a programme, which then relates to whether the programme is implemented or not. The teachers' interpretations of what the implementation of an HIV & AIDS programme entails are, in turn, constructed through their active participation in a social world filled with its own meanings and constructions of an HIV & AIDS programme.

Hayes and Oppenheim (1997:21) formulate the following common principles for a constructivist approach, such as that development is contextual, individuals are producers of their own development, cognition is an active relating of events, and that meaning-making is self-evolution. As a constructivist researcher, I shall engage in a search for the deep structure that underlies the construction of meaning as expressed in specific societal phenomena and actions, that is I will engage in a deep search for contextual factors within schools that influence the implementation of HIV & AIDS programmes (Hayes & Oppenheim 1997:33). These statements support my idea that teachers who are responsible for the implementation of the HIV & AIDS programme will construct their own understanding of what the implementation entails (in their particular contexts), which is then related to contextual factors that are present in the contexts of their schools.

1.8 METHODOLOGICAL APPROACH

I shall now highlight my methodological approach in order to orientate the reader with regard to the expectations and methodology of this study. This study aims at exploring a phenomenon, namely the contextual factors that influence the implementation of the HIV & AIDS programme in schools. However, various secondary aims will guide the inquiry (in this regard refer to paragraph 1.4 above).

1.8.1 Qualitative research approach

In the light of the primary aim of this study, that is to identify and investigate the experiences of teachers with regard to the implementation of the HIV & AIDS programme in schools, I prefer to follow a qualitative research approach. According to Ericson (1986:125), qualitative research design aims at gaining greater insight into man's situation. The qualitative approach may provide me with an opportunity to gain insight into the subjective experiences of individuals or groups with sensitivity regarding the contexts in which they interact with each other. Garbers (1996:15) adds that the qualitative approach places an emphasis on better understanding of human behaviour and experiences. Within the qualitative framework, the influence of relative factors on social relationships is also considered. I am convinced that a qualitative research approach will provide me with an understanding of the manner in which contextual factors influence the implementation of an HIV & AIDS programme from the participants' points of view (MacMillan & Schumacher 2001:16).

Parker, Dalrymple and Durden (2000:82) also state that qualitative research is concerned with trying to understand meaning and influence in a more multifaceted way. I believe that I might identify unanticipated information by means of my qualitative research approach, since the discussion is not limited by predetermined closed questions. A qualitative approach may therefore

provide me with vivid information with regard to the manner in which the teachers feel, think and act, as well as what they believe regarding the implementation of an HIV & AIDS programme in their schools. I concur with Willig (2001:15) as he points out that qualitative research provides the researcher with an opportunity to study meanings.

1.9 RESEARCH METHODOLOGY AND DESIGN

I shall now focus the discussion on the research methodology and design in order to orientate the reader with regard to the methodological expectations of my study.

1.9.1 Instrumental case study design

For the purpose of this study, I prefer to follow an instrumental case study design. An instrumental case study design with regard to scientific research will allow me to obtain an in-depth description of the lived-experiences of my research participants. According to Stake (2000:437), such a design type aims at providing insight into a specific issue or phenomenon.

I foresee that the data in my case studies will be hybrid by nature, consisting of new and existing information. There is, however, a low degree of structure in the design itself (Mouton 2001:149). I prefer this design, as it complements the exploratory and inductive approach and is consistent with the aim of identifying and investigating the experiences of school management teams and teachers that influence the implementation of the HIV & AIDS programme.

An instrumental case study design is selected with the main purpose of answering my research question, and in order to gain insight into the underlying issue, rather than the cases themselves (Bergen & While 2000:45; Stake 2000:438; Berg 2001:68; Cohen, Manion & Morrison 2003:183). This

may provide me with a clear understanding of the manner in which contextual factors influence the implementation of HIV & AIDS programmes. I assert that the purpose of this instrumental case study design is to support me in order to obtain a deeper understanding of any possible external theoretical questions or problems (Berg 2001:225). Although I shall investigate the selected cases, analyse their contexts, and describe their regular implementation activities in detail (Stake 2000:439), these activities will merely serve a supportive role during which the actual research interest (primary question) can be explored. I further believe that, by applying an instrumental case study design, I might obtain elaborate descriptions of the experiences of school management teams and teachers who implement HIV & AIDS programmes.

In choosing an instrumental case study design, I can rely on the advantage of not only understanding the important issues about my particular research, but also highlighting other critical issues at hand (Stake 2000:439). Further characteristics of an instrumental case study design that I find advantageous are that it will force me to constantly reflect on and revise meanings and impressions that I gain. Although I acknowledge that generalization will be limited, I shall be able to provide detailed, in-depth information and material for readers to discover on their own that which even I may not know, as well as refine theory and encourage hypotheses and successive studies (Stake 2000:440; Berg 2001:231).

Some of the challenges and limitations of an instrumental case study design that I have to keep in mind are as follows: generalizations cannot be made from a single or a few case studies; causal links are difficult to test as they are prone to problems of observer bias and they may be subjective, personal, selective and biased (Terre Blance & Durrheim 2002:133; Cohen *et al.*, 2003:184). Having taken cognisance of these challenges, it is important for me to keep in mind that the purpose of the proposed study is to present the case, which is the contextual factors that influence implementation of HIV &

AIDS programmes in secondary schools in Soshanguve, and not anywhere else in the world.

1.9.2 Selection of participants

McMillan and Schumacher (2001:39) state that data collection techniques refer to the specific skills and actions that are performed in order to gain information on the problem that is being investigated. Several practical skills are required for collecting data when conducting scientific research. The most important will be selecting a reliable sample of literature and participants for this study, in order to ensure that it is directly, or as closely as possible, related to the reality of contextual factors that influence the implementation of HIV & AIDS programmes in secondary schools.

In the light of the fact that it will be difficult to interview every teacher that is responsible for implementing HIV & AIDS programmes, a sample population will be selected by means of a convenience sampling technique.

1.9.3 Convenience sampling

Convenience sampling (also referred to as accidental or opportunity sampling) requires of me to choose the nearest individuals to serve as participants, and to continue the process until the required sample size has been obtained (Cohen *et al.*, 2003:102).

McMillan and Schumacher (2001:176) declare that in research on effective programme implementation, it may be most informative to select expert or master teachers rather than a sample of all teachers. Patton (2002:230) states that convenience sampling is the selection of information-rich cases for obtaining an in-depth understanding.

Three Soshanguve schools will be conveniently selected for the purpose of this research, as the researcher is currently a teacher at a secondary school in Soshanguve. The choice of schools within the vicinity will enhance accessibility to the research participants, as well as to suitable facilities to complete semi-structured interviews.

A number of twelve participants will further be purposively selected from the conveniently selected schools. Two identified teachers in each school that have been trained as “Master Trainers” by the Gauteng Department of Education, with reference to the implementation of HIV & AIDS programmes, will form part of the sample population for this study. These “Master Trainers” are nominated teachers from secondary schools that had been trained by their respective School Districts with regard to HIV & AIDS education. These teachers had attended a four-day training course in order to enable them to implement the HIV & AIDS education programme. It was expected that these teachers (Master Trainers) would then provide the same training to colleagues of their own schools as well as neighbouring schools in their cluster. The remaining participants will be the respective principal and members of the school management team (head of department for Human and Social Sciences) of each selected school.

These teachers are selected because of their special interest in the HIV & AIDS programme in schools and the specialised training that they have received from the Gauteng Department of Education. These participants are chosen because they are likely to have specialised knowledge and information with regard to the implementation of HIV & AIDS prevention programmes.

1.9.4 Data collection

In order to add depth and richness to the proposed study, I shall use multiple data collection methods. Janesick (2000:288) refers to the use of multiple methods of data collection as the process of crystallization that is used to add

and reflect different nuances to the gathered data. In the light of the qualitative paradigm and instrumental case study design, as discussed in paragraphs 1.8 and 19.1, the following data collection methods may provide the most reliable responses and contribute to the quality of the data:

1.9.4.1 Conceptual analysis

For the purposes of my study, the aim of the conceptual analysis as a non-interactive qualitative mode of inquiry is to describe the meanings, use and application of concepts in the study. It will be a process of separating the combined units of something (terms or concepts) in order to examine and describe them. When applying conceptual analysis as a method, I shall make an effort to “take apart, revisit, reconsider, study and describe” the different meanings of concepts, in order to provide clear perspectives on the problem that I am investigating (McMillan & Schumacher 2001:39).

1.9.4.2 Analysis of primary sources

In this study, I shall analyse primary sources, which to me will refer to original documentation or the remains thereof, such as report from persons that have participated in events relevant to this study, or were eyewitnesses to such events. In my study, “remains” will refer to sources that have been preserved intentionally to supply information, for example official minutes, articles and correspondence.

1.9.4.3 Analysis of secondary sources

The secondary sources that I shall utilize in this study, will for example consist of reports from people that were not eyewitness to, or part of, an event – but only reported what the person, who was physically part of an event, had said or wrote. I also regard textbooks, encyclopaedias, dissertations and theses as secondary sources.

1.9.4.4 Semi-structured interviews

Merriam (1998:74) states that semi-structured interviews ensure flowing discussions and in-depth knowledge with regard to the researched phenomenon. I shall therefore conduct semi-structured interviews with teachers responsible for Life-orientation and/or HIV & AIDS programmes, as well as the principal and head of department for Human and Social Sciences in the three selected schools. Semi-structured interviews will allow for flowing discussions, and will enable me to gain in-depth insight with regard to the participants' lived-experiences during the implementation and presentation of HIV & AIDS education programmes. The personal experiences and perceptions of the teachers will provide me with valuable information with regard to the phenomenon under investigation (O'Donoghue & Punch 2003:57).

From an interpretivist perspective, the interviews will provide me with the teachers' perspectives and experiences. I base this on the assumption that the research participants are able to provide me with clear perspectives that are knowable and significant. Through the interviews, I should therefore be able to determine the participants' knowledge, values and preferences, as well as their attitudes and beliefs (Patton 2002:306; Cohen *et al.*, 2003:268).

I concur with Babbie and Mouton (2001:278) as well as McMillan and Schumacher (2001:269), that a qualitative interview is an interaction between the researcher and a research participant, during which the researcher has a general plan of inquiry for the interview, but not a detailed set of questions that must be asked in particular words or in a particular order. I view a qualitative interview as a conversation during which topics may be raised by the participant while I (as the interviewer) can determine a general direction, to obtain research-relevant information. For the purpose of this study, I shall use open-ended questions with the intention of providing opportunities for the participants to share their personal experiences, opinions and beliefs (Cohen

et al., 2003:271; Schurink 1998:300). With their permission I shall tape-record and then transcribe the interviews with the aim of performing the first level of analysis. Using recorded data will give me of the advantage of being able to correct possible limitations regarding intuition and recollection (Silverman 1994:119).

1.9.4.5 Field Observation

Field observation is regarded as fundamental to most qualitative research (McMillan & Schumacher 2001:41). During the interviews, I shall note down detailed descriptions of events, people, actions, and objects in the setting (school). I shall record these observations in detail during and as soon as possible after an interview, to paint a vivid picture that also includes non-verbal signals during verbal conversations.

1.9.4.6 Visual data collection

I want to include the use of visual data as part of my data collection process, mainly as a means of data capturing. This method of qualitative research will provide me with records of the activities of the participants, and might enable the collection of information that could be difficult to obtain otherwise (Cohen *et al.*, 2003:279; Creswell 2003:187), regarding non-verbal communication, that could be missed during interviews. The use of visual data in addition to interviews may contribute to the richness of my data. By applying a visual data collection method, the potential partiality regarding observations of a single event can also be surmounted, as well as the possible tendency towards only recording frequently occurring events (Cohen *et al.*, 2003:313).

1.9.4.7 Reflective journal

In addition to the methods discussed above, I shall keep a reflective journal in order to capture and reflect on my experiences, perceptions and

interpretations. Bogdan and Biklen (1992:122) identify aspects that could be included in such a journal. These aspects include reflection on the methods used during the process of data collection and analysis; the researcher's own reactions to observations and recordings; as well as ethical issues, tensions and challenges experienced during the inquiry.

I am certain that a thorough and meticulously kept journal will also contribute to the richness of my data. The use of a journal will also enable me to reflect on the practicalities of my fieldwork and on emergent interpretations of the significance of the collected data. My journal will be a systematic attempt to facilitate the interpretative process that is at the heart of qualitative research (Ezzy 2002:72).

1.9.5 Data analysis and interpretation

According to Mouton (2001:108-109), data analysis is done with the intention to understand the different constitutive elements of the data by means of an inspection of the relationship between concepts, constructs and variables, to uncover any possible patterns or trends that can be isolated, and to establish themes in the data. The interpretation of the collected data entails the synthesis of data into larger coherent wholes.

Hatch (2002:148) states that data analysis is a systematic search for meaning, a way to process qualitative data so that what has been learned can be communicated to others. I shall analyse my data systematically by means of thematic analysis (refer to Diagram 4.9 in Chapter 4). The data will be inductively analysed in order for me to identify recurring patterns or common themes that are evident across the data (Merriam 1998:7). Most importantly, I shall aim to gain insight into the fundamental nature of the lived-experiences of my participants with regard to the implementation of HIV & AIDS programmes (O'Donoghue & Punch 2003:47). I shall commence with data analysis after the interviews have been transcribed verbatim. I envisage

that the data will initially present themselves in a confusing and illogic manner. I shall proactively identify a controllable index of categories (themes) in order to identify contextual factors that might influence the implementation of HIV & AIDS programmes (Mouton 2001:109).

Thereafter, I shall consult the participants in order to verify the accuracy of the collected data. I trust that this will enhance the authenticity and dependability of the findings (Cohen *et al.*, 2003:164), based on the assumptions of interpretivism and constructivism. Participant evaluation (or member checking) is significant and valuable, as the participants may wish to include additional information or even propose an alternative way of conveying the issue at hand. According to McMillan and Schumacher (2001:410), member checking can also be done during an interview, as topics are rephrased and explored to gain more comprehensive and accurate meanings.

1.9.6 Quality criteria

According to Babbie and Mouton (2001:271), the basic argument of trustworthiness is that of how researchers can convince their audiences that the findings of the study are worth paying attention to, or worth talking about. In relation to this, Denzin and Lincoln (2000:21) explain that terms such as 'credibility', 'transferability', 'dependability' and 'confirmability' replace the customary positivist criteria of internal and external validity, reliability and objectivity. Cohen *et al.* (2003:108) include 'authenticity' as a strategy to increase the trustworthiness of research.

1.9.6.1 Credibility

The aim with regard to credibility is to provide a true picture of the phenomenon under scrutiny (Poggenpoel 1998:351; Babbie & Mouton 2001:276)

I shall ensure credibility by means of the data analysis that I apply. I shall consider multiple perspectives, including member checking. I shall supplement this by making use of crystallization, as well as through thorough literature control. Frequent debriefing sessions with my study supervisor will further add to the richness and credibility of the findings (Babbie & Mouton 2001:277).

1.9.6.2 Transferability

According to Babbie and Mouton (2001:277), transferability is the extent to which the findings of a study can be applied to other respondents in other contexts. Due to the fact that meanings fluctuate across different contexts of human interaction, I shall aim at transferability rather than to generalising findings, by providing sufficiently rich, descriptive information with regard to the phenomenon under investigation, as well as about the meanings that develop during the investigation.

In the light of the interpretivist stance in this study, I shall aim to obtain the different inferences of each data source, therefore presenting a rich description of the data collected. Each piece of obtained information will render its own interpretation of what has been discovered.

1.9.6.3 Dependability

Dependability in research provides an indication of whether or not the findings would be the same if the study was replicated in the same (or a similar) context or with the same participants (Babbie & Mouton 2001:278). According to Guba and Lincoln (in Babbie & Mouton 2001:278), a display of credibility seems to be sufficient to establish the existence of dependability.

As mentioned earlier, the aim of my study is not to generalise, but rather to gain an in-depth understanding of contextual factors that influence the implementation of HIV & AIDS programmes in schools. The fact, that I shall obtain contributions from other persons during the data analysis, namely the supervisor of my study as well as through the participants involved, strengthens the possibility of the findings being fairly dependable and probably comparable to findings about similar groups of people and contexts. In addition, I shall provide a highly detailed methodological description to facilitate repetition of the study in similar contexts (Shenton 2004:71).

1.9.6.4 Confirmability

According to Babbie and Mouton (2001:278), confirmability is the degree to which the findings are the product of the focus of research, and not of the biases of the researcher. Freedom from bias in research is contradictory to the underlying assumptions of the interpretivist and constructivist approaches, according to which the values and motives of the researcher do play an essential part in the research process.

Scientific research, especially on sensitive issues such as HIV & AIDS, gender and sexuality requires strict self-control from the researcher. I shall regard confirmability as more important than being dispassionate or unbiased in the collection and interpretation of facts, and be careful not to tailor personal conceptions to fit my own preconceived notions or preferences. Research integrity will necessitate that I overcome personal and prejudicial attitudes, personal preconceptions and value judgements, and not be subject to traditional or "received systems" of thinking (Cohen *et al.*, 2003:129). I shall take care not to pursue only the apparent and obvious ideas and discoveries, but I shall also consider the inexplicable or complex ones according to the significance they have for answering the primary question of this study.

1.9.6.5 Authenticity

I regard authenticity as the ability of research to report a situation through the eyes of the participants (Cohen *et al.*, 2003:108). In my attempt to ensure authenticity, I shall make use of member checking and multiple data collection methods, in order to ensure fairness and provide a comprehensive and balanced representation of multiple realities with regard to the implementation of HIV & AIDS programmes in schools. I aim to ensure ontological authenticity by providing a fresh and more sophisticated understanding of the implementation of HIV & AIDS programmes in schools. I shall attempt to provide a clearer understanding of the challenges (contextual factors) that teachers experience, aiming at eventually improving the implementation of HIV & AIDS programmes in schools, and thereby ensuring catalytic authenticity in my research.

1.9.7 Ethical considerations

Due to the social nature of this research, I am aware that I not only have a responsibility towards my profession in the search for knowledge and truth, but also towards the research participants (Strydom 1998:25; Cohen *et al.*, 2003:292). The manner in which I conduct my research will at all times aim to preserve the dignity of the participants. This implies that I shall meticulously follow the ethical procedures of the University of Pretoria.

1.9.7.1 Informed consent

In the light of the sensitive nature of gathered information and discussions that might occur, I shall obtain permission from the relevant authorities, such as the Gauteng Department of Education, the relevant school principals, and teachers (in this regard refer to Addenda C and D regarding permission to conduct research, and Addendum E for the various letters of informed consent). This implies that the research participants will have the right to

choose whether, or not, to participate in the research study after being informed of facts that might influence their decisions (McMillan & Schumacher 2001:421; Cohen *et al.*, 2003:292). I shall provide the research participants with adequate information on the purpose of the study, the procedures I shall follow, as well as the possible advantages of the outcomes of the study. The right of participants to withdraw from the study at any time will also be emphasised.

1.9.7.2 Privacy, confidentiality and anonymity

I shall apply the principle of privacy, meaning that I shall ensure and protect the confidentiality and anonymity of the participants at all times (Strydom 1998:28; McMillan & Schumacher 2001:422; Cohen *et al.*, 2003:292). An advantage of protecting the privacy of participants is that it will ensure the attainment of maximum response during interviews. I shall not disclose the identities of the research participants during the study and shall deal with all information obtained during the research process in a confidential manner. I plan to preserve all field notes, visual material, transcripts and other data in a safe environment, and to destroy them only after the stipulated time has expired.

1.9.7.3 Protection from harm

In order to protect participants from harm, I shall try to avoid or at least recognise and communicate probable risk to the participants, such as exposure to psychological, physical or social harm (Strydom 1998:33; Berg 2001:232). I shall adhere to the principles of caring and fairness, as mentioned by McMillan and Schumacher (2001:422), with the intention of protecting participants from harm. At this stage of my research, I anticipate that the participants may be afraid of being labelled as informants who divulge sensitive information with regard to the implementation of HIV &

AIDS programmes in their schools. In order to avoid possible social harm, I shall assure the participants of their privacy and anonymity.

1.10 SIGNIFICANCE OF THIS STUDY

I am convinced that the identification of contextual factors and a description of the manner in which they influence the implementation of HIV & AIDS programmes may contribute to the improvement of curriculum delivery to learners. I anticipate that my study will contribute new knowledge with regard to contextual factors that influence the implementation and management of curricula in schools. In addition, this study could inform policy developers with regard to shortcomings in the current HIV & AIDS school policy and eventually result in the improvement of the programmes in schools. This study could also have significance regarding the improvement of teacher training in respect of the Life Orientation Learning Area. I anticipate that this study will inform policy makers with regard to the challenges that schools experience during the implementation of HIV & AIDS programmes.

1.11 CHALLENGES OF THE STUDY

Language differences may be regarded as a serious challenge regarding the study. I shall enter the field as a person with a cultural and linguistic background that differs from that of the research participants. According to Berg (2001:58), the interviewer's language should be understandable to the research participants and the interview should (ideally) be conducted on their level and/or in their preferred language. Although none of the participants speak English as a first language, all interviews will be conducted in English, due to the fact that English is used as a medium of instruction in all the participating schools in Soshanguve. This challenge may be overcome by using an interpreter if necessary in order to ensure that possible suspicions and uncertainties are clarified. Being a white South African male with my own personality and life-history implies a degree of subjectivity and prejudices.

This fact necessitates that I constantly will have to self reflect and seek clarity from participants when uncertainties arise.

1.12 OUTLINE OF THE STUDY

In the light of the fact that this study diverges into different sections, the proposed outline of the chapters is as follows:

□ Chapter 1: Introduction and Orientation

Chapter 1 provides an overview that commences with an introductory orientation that is followed by the purpose and rationale of the study, the paradigmatic perspective and the conceptualisation. The research design and methodology are outlined and discussed and the chapter is concluded with a discussion on the quality criteria, significance, and possible challenges of the study.

□ Chapter 2: Literature review

Chapter 2 will outline the conceptual framework of the study, based on relevant, authoritative literature on HIV & AIDS programmes and their implementation.

□ Chapter 3: Designing and conducting the empirical research

The research process, with detailed attention to research design and methodology, will be outlined in Chapter 3. The proposed methods of data collection, data analysis and data interpretation will be outlined and justified.

□ **Chapter 4: Reporting the results of the study**

The fourth chapter will include the presentation and discussion of the data obtained and analysed. This will be followed by a detailed discussion of the findings and interpretation of the results. The findings of the study will be compared with findings reported in relevant literature (where applicable), as discussed in Chapter 2.

□ **Chapter 5: Synthesis, findings and recommendations**

The final chapter will include a synthesis and conclusions of the study. Findings will be linked to the research questions posed in Chapter 1. The possible contribution (new knowledge) of the study, as well as the challenges encountered, will be indicated. Recommendations for further research, practice and training will be suggested.

1.13 SUMMARY

This chapter presents an introduction and general orientation regarding the study, and provides a background against which the rest of the thesis can be read. I outlined the aim and relevance of the study with regard to various choices that I made during the planning phase. The main research question, that is formulated against the background of these choices and considerations, reads as follows: In what manner do contextual factors influence the implementation of HIV & AIDS programmes in South African schools?

I indicated what the contribution of my study will be, and briefly discussed the selected paradigm, methodological choices and process of the empirical part of the study. Furthermore, I indicated what attention I shall give to ethical issues and quality criteria during my study. These aspects are dealt with in more detail in Chapter 3.

In Chapter 2, I shall elucidate the conceptual framework of the study, by exploring literature on the HIV & AIDS pandemic and HIV & AIDS programmes. The discussions in Chapter 2 will then represent the background to the empirical study, which is described in Chapter 3.