

# **A BIBLICAL APPROACH TO POVERTY ALLEVIATION:**

A Case Study of Pinelands Methodist  
Church, Phambili ngeThemba's  
Community Building Efforts through  
Job Creation in Langa Township

by

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Submitted in fulfillment of the requirements for the degree

**MAGISTER ARTIUM**

In the Faculty of Theology, University of Pretoria

The study was done through the Cape Town Baptist  
Seminary

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**October 2009**

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# LIST OF ABBREVIATIONS, ACRONYMS, AND INITIALISMS

## Abbreviations:

### ▪ General

1. cf. compare with
2. C-Index food Consumer index for food
3. ed/eds editor/editors
4. ed. edition
5. EQ Emotional Quotient
6. f. (and) following
7. IQ Intelligence Quotient
8. P-Index Priority Index
9. s.a. sine anno – without date – no date
10. [sic] error
11. Vol Volume

### ▪ Symbol

12. > greater than

### ▪ Scripture and related

13. B.C.E. Before the Common Era/Before the Christian Era
14. NT New Testament
15. OT Old Testament
16. ESV English Standard Version
17. LXX Septuagint

- |           |   |
|-----------|---|
| 18. NKJV  | New King James Version of the Bible         |
| 19. NLT   | New Living Translation of the Bible         |
| 20. SABJT | South African Baptist Journal of Theology   |
| 21. TDNT  | Theological Dictionary of the New Testament |
| 22. TDOT  | Theological Dictionary of the Old Testament |
| 23. TWOT  | Theological Wordbook of the Old Testament   |

### Acronyms and initialisms:

- |             |  |
|-------------|--|
| 1. AIDS     | <i>acquired immune deficiency syndrome</i>   |
| 2. ANC      | African National Congress  |
| 3. ARV      | antiretroviral   |
| 4. BCM      | Black Consciousness Movement   |
| 5. CELAM II | The meeting Roman Catholic bishops of Latin America gathered for a congress in Medellin, Colombia. |
| 6. COSATU   | Congress of South African Trade Unions   |
| 7. CPI-food | Consumer Price Index of food   |
| 8. DET      | Department of Education  |
| 9. ESKOM    | Electricity Supply Commission, (South Africa)  |
| 10. GDP     | Gross Domestic Product   |
| 11. HIV     | <i>human immunodeficiency virus</i>  |
| 12. HSRC    | Human Sciences Research Council  |
| 13. IDP     | Integrated Development Plan (Cape Town)  |
| 14. JETS    | Joint Educational Trust Services   |
| 15. KFF     | Kaiser Family Foundation   |
| 16. MDR     | multi-drug resistant TB  |
| 17. NGT     | Nominal Group Technique  |
| 18. OBE     | Outcomes Based Education   |
| 19. OXFAM   | Oxford Committee for Famine Relief   |
| 20. PERO    | Provincial Economic Review and Outlook   |
| 21. PIRLS   | Progress in International Reading Literacy Study   |
| 22. SACP    | South African Communist Party  |

- |                  |   |
|------------------|---|
| 23. SAICE        | South African Institute of Civil Engineers            |
| 24. SAPS         | South African Police Services                         |
| 25. TAC          | Treatment Action Campaign                             |
| 26. TB           | tuberculosis  |
| 27. TIMSS        | Trends in International Mathematics and Science Study |
| 28. UCT          | University of Cape Town                               |
| 29. UNAIDS       | Joint United Nations Programme on HIV/AIDS            |
| 30. UNDP         | United Nations Development Programme                  |
| 31. UNDR         | United Nations Development Report(s)                  |
| 32. URDR         | Unit for Religion and Development Report              |
| 33. USAID        | US Agency for International Development               |
| 34. USAID Health | US Agency for International Development for Health    |
| 35. WHO          | World Health Organization                             |
| 36. XDR          | extensively drug resistant tuberculosis               |

## LIST OF KEYWORDS

1. poverty alleviation
2. biblical approach
3. needs assessment
4. Priority Index (P-Index)
5. Schutte Scale
6. poor
7. skills training
8. employment
9. mentoring
10. self-sufficiency
11. Langa
12. Pinelands Methodist Church
13. Phambili ngeThemba
14. Zanokhanyo
15. Learn to Earn

## SUMMARY

The purpose of this research project was to determine an appropriate intervention to assist in bringing transformation to the poverty-stricken community of Langa, Cape Town, South Africa.

Intense poverty is a fact of life for almost 3 billion people in the world, a figure which includes approximately 50 per cent of the South African population. The Bible gives clear instruction mandating care for 'the poor'. Therefore, those claiming to follow the teaching of Scripture must make poverty alleviation a priority.

*Phambili ngeThemba* began as an intervention in the Langa Township community to discover ways to engage with issues around poverty. Research facilitated by *Learn to Earn*, a non-profit organization offering skills training and job creation, was done to understand if individual and community development was necessary and, if so, how it could be structured as a method to alleviate poverty in the Langa Community.

Both quantitative and qualitative research was undertaken. Through random proportionate sampling in a thorough needs analysis of the businesses in and around Langa, the ideal character qualities desired by local business for the workforce were elicited. These were traits that could be developed in unemployed people. Use of basic questionnaires and oral feedback by three selected focus groups comprised of Langa residents enabled evaluation of local human service resources and identification of the felt needs in the community. The Priority Index (P-Index) research technique distinguished between the actual needs of the community and their perceived needs or wants. The results became the training foundation for the *Zanokhanyo Training and Resource Centre*, providing holistic development for the unemployed to equip them for placement in the workforce.

## ACKNOWLEDGEMENTS

The author wishes to express his appreciation to the following persons and organisations that have helped to make this thesis possible.

Pinelands Methodist Church—it's been more than a job, it's an adventure! Your vision and willingness to grapple with the issues of poverty and what must be done about it have birthed Phambili ngeThemba and, in turn, the Zankhayno Training and Resource Centre. Thanks for your willingness to walk by Faith and for inviting me to be your Youth Pastor.

Zankhanyo Team—it is never easy to bring something to life. Thanks to Nicky Lloyd, Eugene Pelteret, Linda Chonco and Leslie Black for grappling with what this training should look like and how to make it effective. What an honour it is to work with such gifted people!

Learn to Earn—Thanks, Roche' for refusing to believe that things must remain the same and for pulling us into the vision of what South Africa can look like with God's help.

Dr. Murray Leibbrandt, Mr. David Hunter—thanks, boets, for allowing me to 'talk shop' as we run through Cape Town. There is nothing like talking economics (or geopolitical history!) while running in the shadow of Table Mountain.

Dr. Godfrey Harold—Your class on *Ephesians* forced me to grapple with the truths of Scripture and to put what I found in writing. Thanks for your insights and encouragement in bringing this project to completion.

Blacksburg Christian Fellowship—your partnership in the gospel is amazing. Thanks for your support from so far away.

Ms. Lynn Crutchley—your labour over the final drafts has been incredible. If there is quality found in the finished product, it is because you worked so hard to make it so. Thanks, Lynn, for applying your 'Harvard System' editing and formatting skills in such an extravagant way.

James and William—I am really proud of you guys. It is really great to be your dad and it's time to step away from my computer for awhile!

Leslie—thanks for your patience—you're still by far the best researcher in the family. 'If the rest is as good as the last has been, here's hail to the rest of the road...'

Tim Black  
Cape Town 2009

# CHAPTER 1

## A BIBLICAL APPROACH TO POVERTY ALLEVIATION:

### A CASE STUDY OF PINELANDS METHODIST CHURCH, PHAMBILI NGETHEMBA'S COMMUNITY BUILDING EFFORTS THROUGH JOB CREATION IN LANGA TOWNSHIP

Sometimes I think, 'If I die, I won't have to see my children suffering as they are.' Sometimes I even think of killing myself. So often I see them crying, hungry; and there I am, without a cent to buy them some bread. I think, 'My God, I can't face it! I'll end my life. I don't want to look anymore!' Iracema da Silva, resident of a slum in Brazil (Sider 2005:1).

## 1 Purpose

This research project seeks to contribute to the discussion of the role of the church in poverty alleviation. It examines how this role should be defined from a biblical perspective, proposing a viable methodology to deal with poverty in Langa Township, Cape Town.

The project develops from consideration of a series of questions emanating from a praxis-theory-praxis research model. Andrew Root points out that according to this model, 'experience leads to reflection which leads to new action' (2007:20). Practical theologian Richard Osmer has identified four questions that help one to navigate within a theological framework. The

questions begin as an *empirical descriptive* question—‘What is happening?’ followed by an *interpretive* question—‘Why is this happening?’, then an explicitly *theological* or *normative* question—‘What ought to be happening?’, and finally as a *pragmatic* question—‘How should we act or what should we do in light of what is happening?’ (2004:150-152). Titles of Chapters 2-5 are these four apposite questions respectively. Osmer’s methodology not only defines the problem but also asks why the problem *is* a problem, seeking all the while to discover appropriate solutions. Biblical guidelines and exhortations unveil the proposed model within a theological framework. Finally, a case study will detail how one group of people in a regional church-based context is applying the empirical research to the problem of poverty.

## **2 Description Of The Problem**

It is difficult to obtain precise global statistics, but based on the narrow definitions of poverty an estimated 1.2 billion people worldwide are living in ‘grinding poverty’, that is, they are trying to stay alive on less than one dollar a day. (World Bank 2003:3) In addition to these, another 1.6 billion are very poor, living on two dollars or less per day (World Bank 2003:3).

Although it is nearly as difficult to obtain precise statistics on a national scale as it is on a global scale, poverty is undoubtedly a serious problem in South Africa. In 2003, the United Nations Development Programme [UNDP] published its South Africa Human Development Report (UNDP 2003). Among other things, the publication reported on changes in poverty and income equality. The study



uses a poverty line of R354.00 per adult per month adjusted to 2002 prices paid for a monthly food parcel that would satisfy basic nutritional needs. The associated poverty headcount rate—those living below this threshold—was determined to be 48.5 percent of the total population in 2002. Research undertaken by the Unit for Religion and Development at Stellenbosch University confirmed that the Langa community reflects the national picture (URDR 2004:16). This is explored further in Chapter 2.

### 3 Motivation

Since Christians believe that God revealed himself most completely in Jesus of Nazareth, they can more fully understand God's activity in the world by examining how Jesus defined his earthly mission. The Gospel of Luke provides Jesus' declaration of his mission, quoting the Old Testament prophet Isaiah:

The Spirit of the Lord is upon me, because he has anointed me to proclaim good news to the poor. He has sent me to proclaim liberty to the captives and recovering of sight to the blind, to set at liberty those who are oppressed, to proclaim the year of the Lord's favour (Luke 4:18-19 English Standard Version).<sup>1</sup>

After reading these words in the synagogue, Jesus informed those present that he was the fulfilment of this Scripture.<sup>2</sup>

Jesus understood his mission as one of reconciliation on many levels: (i) preaching good news to the poor, (ii) proclaiming release to captives, (iii) bringing sight to the blind, (iv) freeing the oppressed, and (v) proclaiming the

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<sup>1</sup> Unless otherwise indicated, all Scripture quotations are from the *English Standard Version* [ESV].

<sup>2</sup> By the time Jesus finished in the synagogue, those present had turned into an angry mob that attempted to throw him off a cliff. (Luke 4:29)

acceptable year of the Lord.<sup>3</sup> The incarnational ministry of Jesus was true to his openly declared mission objectives. He spent considerable time ministering to marginalised people of every description. Ronald Sider believes one of the most fundamental reasons for Christian concern for the poor, therefore, is that at the moment in history when God became man, part of his mission was to liberate the poor and oppressed and '[h]e summons those who follow him to do the same' (2005:47).

## 4 Hypothesis

I approach this subject in practical consideration of the impact of poverty upon South Africa and the necessity upon which something significant must be done to answer this growing crisis. My argument will show that the church is compelled by the Biblical mandate to meet the immediate needs of the poor while bringing about long-term solutions to help the poor get out of poverty. Empirical research and the analysis of the local business community and Langa Township supply practical strategies and solutions for putting people to work, thereby directly impacting poverty in Langa. Although the church is not the only institution with such a lofty responsibility, its status in the community may make it the one most able to effect lasting change.

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<sup>3</sup> Some try to avoid the clear meaning of the words of Jesus by spiritualising this text, but in the original Old Testament context they referred to physical oppression and captivity. Luke 7:18-23 contains a similar list in which Jesus clearly refers to material and physical problems (Sider 2005:47).

## 5 Methodology

This project involves a literature study on the topic of poverty, both globally and nationally, and includes some of the issues that have developed around the presence of poverty. It also contains an empirical study conducted in Langa and its surrounding business communities.

Chapter 1 gives the overall background for the project, providing a brief introduction and overview.

Chapter 2 defines the context for this project as it considers the question, 'What is happening?'. It defines poverty as it exists globally and nationally in its varying degrees. Consideration is given to the social ramifications existing in an impoverished society since the presence of poverty provides fertile soil for HIV/AIDS transmission, crime, and an overall sense of hopelessness. As community statistics show, the Langa Township in Cape Town is a microcosm of the greater national picture, thus providing the local South African context of this research project.

Chapter 3 deals with the reasons behind poverty in an attempt to answer the question, 'Why is this happening?'. While there are no simple answers, many factors play a role in maintaining the current inequities, including the legacy of apartheid, government policy and poor service delivery on many levels.

Chapter 4 answers the question, ‘What should be happening?’. A literature study examines the biblical issues surrounding poverty as evidenced in Scripture and the theological model that emerges for followers of Jesus. A biblical perspective is adduced by defining what Scripture means by ‘the poor’ and helps to determine the proper reaction in today’s context. A response for the 21st century is cross-examined in light of common and prevailing theologies around poverty and how they are to be rightly interpreted according to the ‘good news’ preached by Jesus and his apostles.

Chapter 5, in answer to the question, ‘How should we respond?’ details the research model, which is best described as cyclical and interactive. This allows the different phases of the research process to be regularly evaluated and revised as needed. Participative action research methodology is used since it is both qualitative and empirical in nature.<sup>4</sup>

The first phase of the research looked at the institutional landscape of the research area, including places of social influence. Research teams systematically gathered data from the identified business areas and, using a hand-held Global Positioning System [GPS] device, plotted business location coordinates.

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<sup>4</sup> Action research is:

a participatory, democratic process concerned with developing practical knowing in the pursuit of worthwhile human purposes, grounded in a participatory worldview which ... is emerging at this very moment. It seeks to bring together action and reflection, theory and practice, in participation with others, in pursuit of practical solutions to issues of pressing concern to people, and more generally the flourishing of individual persons and their communities (Reason & Bradbury 2001:1).

The second phase involved taking the processed data from phase one and selecting a sample of these businesses for an in-depth interview using random proportionate sampling. The aim of the interviews was to gain further insight into what businesses require for their entrance staffing needs and simultaneously ascertain possible employment opportunities.

The third phase selected three focus groups as part of a needs assessment of the Langa residential community; members of the group were reflective of the make-up of their community. The *Priority Index* (P-Index) research technique was used in the needs assessment that the three nominal or focus groups would participate in. The *Schutte Scale* was used in this phase of the research because it is a measuring device that can be reliably used for both literate and non-literate persons. It was possible, then, for the P-Index technique to distinguish between the actual or real needs of the community and their perceived or felt needs or wants.

This initial stage of the research that was completed in January 2008 had the following four aims:

- Mapping the business landscape of the study area.
- Analysis of the employment, market and product opportunities for businesses in and around Langa.
- Evaluation of the human services resources within the Langa community.

- Identification of the major challenges, constraints and needs facing the Langa community as indicated by community focus groups. (Delpont & van Wyk 2008:3)

This research describes an effective method of poverty alleviation in Langa whereby community members are enabled to source jobs or are placed in available jobs following completion of holistic training that is modelled on the research outcomes. A local church-based programme is implementing this training and follow-up mentoring during the initial stages of employment to ensure sustainability and productive long-term participation in the workplace. The benefits to both the individual and community are measurable.

Chapter 6 draws findings of the research together and, within the current South African context, proposes a continued way forward especially as it pertains to the Langa community. The church needs to be at the forefront of bringing enduring poverty alleviation, not only to Langa but throughout South Africa.

## **6 Conclusion**

This research shows that the church not only can make a difference in alleviating poverty, but that it must make a difference if it is to be faithful to its biblical mandate. Scripture is filled with God's care and concern for the poor, with the mission of Jesus defined—at least in part—as one that 'brings good news to the poor' (Isaiah 61:1b). A proper understanding of Scripture and, therefore, the subsequent recognition of responsibility to care for those in

poverty should result in sacrificial provision for the needs of the poor, thereby capturing the heart and imagination of a nation and bringing true transformation. It would also change the world.

## CHAPTER 2

### WHAT IS HAPPENING?

Endemic and widespread poverty continues to disfigure the face of our country. It will always be impossible for us to say that we have fully restored the dignity of all our people as long as this situation persists. For this reason the struggle to eradicate poverty has been and will continue to be a cornerstone of the national effort to build the new South Africa (Thabo Mbeki 2006).

#### 1 Introduction

There are many definitions and tense debates about the word poverty, the exact numbers of the poor, where the poor live and how their numbers and economic conditions are changing over time. It is thus helpful to begin with what generally has been agreed to, and then to mention some of the areas of debate. In doing this, Jeffery Sachs strongly suggests that it is important to distinguish between three levels of poverty: 'extreme (or absolute) poverty, moderate poverty, and relative poverty' (2005:20).

- Extreme poverty means that households cannot meet basic needs for survival. They are in chronic hunger, unable to access even basic health care, lack safe drinking water and sanitation, cannot afford education for some or all of their children, and most likely lack proper shelter—they cannot keep the weather out of their rudimentary dwellings.
- Moderate poverty generally means that basic needs are met, but just barely.



- For relative poverty, the household income level is generally construed as a level below 'a given proportion of average national income. The relatively poor, in high income countries, lack access to cultural goods, entertainment, recreation, and to quality health care, education and other perquisites for upward social mobility' (Sachs 2005:20).

The World Bank uses a complicated statistical standard that measures poverty in dollar thresholds at purchasing power parity: for extreme poverty, one dollar or less per person per day, and for moderate poverty between one and two dollars per person per day. Sachs points out that these measurements feature quite prominently in public policy circles as verifiable benchmarks to determine income poverty worldwide (Sachs 2005).

## **2 Defining Poverty**

Many factors contribute to the total picture that defines poverty. It can be defined in a narrow sense or more broadly. Ingrid Woolard and Murray Leibbrandt provide a narrow definition of poverty as 'the inability [of an individual or household] to attain a minimal standard of living, with standard of living being measured in terms of consumption or income levels' (2001:42). Kalie Pauw and Liberty Mncube, on the other hand, give a broader definition stating that poverty 'might consist of a variety of components, including household income/consumption, human capabilities, access to public services, employment and asset ownership' (2007:3). Poverty can be defined in ranges 'representing a state of bare survival, to embracing access to resources that

would enable a person to participate fully in their broader society' (Studies in Poverty and Inequality 2007:10).

The introduction of non-income measures in defining poverty helps to provide a more complete assessment of poverty in its different dimensions. It is important that one tries to classify poverty as nearly as possible because, by so doing, it will help to characterise what a society determines is unacceptable. By identifying what is unacceptable, a society speaks clearly about how it would like things to be, and this includes much more than merely using income thresholds to define poverty. It is vital that 'the concepts, definitions and measurements of poverty, as well as being theoretically robust, are appropriate to the society in which they are applied' (Studies in Poverty and Inequality 2007:5). There is no 'one size fits all' definition that everyone can agree is appropriate for every situation.

For some, arguing about definitions and measures of poverty is not useful, especially in a country like South Africa where the presence of poverty is so patently obvious.<sup>1</sup> They believe it is unnecessary to undergo the complicated procedure needed to measure and quantify poverty. However, being able to accurately define and measure poverty has an essential role in designing interventions. Clearly specifying what is meant by 'poverty' can contribute to its alleviation in the following ways:

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<sup>1</sup> 'Poverty is apparent to the human eye and is profiled by shacks, homelessness, unemployment, casualised labour, poor infrastructure and lack of access to basic services' (Triegaardt 2006:2).

- By being able to measure poverty it is possible to map its geographical severity so that interventions can be properly directed.
- By having a poverty measure one can ascertain whether interventions are effective over a period of time.
- Placing information about the levels of poverty into the public arena encourages others to engage, which helps make a difference throughout society (Studies in Poverty and Inequality 2007).

Poverty alleviation then is not just providing the necessary income to bring people out of poverty. Short-term poverty relief fits this concept.<sup>2</sup> By contrast, longer-term poverty alleviation is an approach that seeks to bring people to a sense of wholeness. This fits broader usage of this definition in common with the United Nations Development Reports [UNDR] that view poverty as the ‘denial of opportunities and choices most basic to human development to lead a long, healthy, creative life and to enjoy a decent standard of living, freedom, dignity, self-esteem and respect from others’ (Statistics South Africa 2000:54). This is a multi-dimensional perspective that sees the lack of sufficient income as only one element in the total picture defining poverty.

Defining poverty in terms of its long-term alleviation also aims to reduce the impact of poverty on the lives of poor people in a way that has a more sustained and permanent result. Programmes of poverty alleviation tend to have longer -term goals and seek to be developmental in their function (Studies

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<sup>2</sup> Poverty relief refers to interventions that seek to give short-term assistance to people living in poverty, usually in response to an external emergency situation that pushes people into a state of increased vulnerability (Studies in Poverty and Inequality 2007).

in Poverty and Inequality 2007). If poverty is more than just a lack of sufficient income to properly sustain life, which is the assumption of this research and seems to be indicated by the generally accepted definition, then holistically-focused community development is essential to any poverty alleviation programme if it is to be truly successful.

## 2.1 The global picture

### 2.1.1 Poverty

According to World Bank economists Shaohua Chen and Martin Ravallion using the narrow definition of poverty of trying to stay alive on less than one dollar a day—1.1 billion people in the world live in extreme poverty (2004:5). In addition to these, another 1.6 billion are very poor, living on two dollars or less per day (Sider 2005:2). Hunger and starvation are constants within the world: thirty thousand children die from hunger and preventable diseases each day and thirteen million people die every year from infectious and parasitic diseases that could have been prevented with today's knowledge (Sider 2005).

However, there may be some good news, although it leaves one with little to be complacent about. Chen and Ravallion estimated in 2004 that compared with 1980 there were 400 million fewer extreme poor in 2000. Yet the picture that emerges is one of 'highly uneven progress, with serious setbacks in some regions and time periods ... (while finding) that the number living under \$2 per day rose ... Thus the number of people living *between* \$1 and \$2 has actually risen sharply over these two decades, from about 1 billion to 1.6 billion'

(2004:5). So though it is estimated that globally there are fewer extreme poor over this twenty year period, there is still a rising number of people who remain in poverty and the levels of poverty seem to have shifted.

The overwhelming majority of the world's extreme poor live in three regions: East Asia, South Asia, and sub-Saharan Africa. Although the numbers of extreme poor since 1981 have fallen in East Asia and South Asia, they have risen substantially in sub-Saharan Africa, with over half of Africa's population living in extreme poverty<sup>3</sup> (Sachs 2005). They live mainly in rural areas, despite the migrations of large populations to the big cities. The incredible challenges they face include: massive droughts, malaria, HIV/AIDS, lack of sufficient roads and methods of transportation, great distances to markets, and lack of electricity and potable drinking water. And this is a short list of the daily struggles. Figures for those living in moderate poverty—living on income of between one and two dollars per day—are also highest in East Asia, South Asia and sub-Saharan Africa, dominating the picture with 87 percent of the world's moderate poor (Sachs 2005).

Adding to this is another equally disturbing fact with massive ramifications that have yet to be fully felt. Compared with 3 years ago, global food prices are currently up 83 percent, putting those people already on the verge of starvation in even greater peril (OXFAM International 2008:1). And there seems to be no relief in sight. The same 2008 OXFAM briefing indicates that food prices will

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<sup>3</sup> 'The incidence of poverty in Sub-Saharan Africa has fluctuated around a mean of 45% for the \$1 per day line (75% for \$2 per day), with no significant trend in either direction. The number of poor has almost doubled in Sub-Saharan Africa over 1981-2001, from 164 million to 316 million living below \$1 per day' (Chen & Ravallion 2004:19-20).

likely remain high and volatile into the foreseeable future due to increasing production costs related to rising oil prices and a greater demand for cereals. In addition, climate change ‘... is expected to lead to more unpredictable weather and climate-related disasters, exacerbating volatility in yields and markets and undermining food availability and the livelihoods of millions of people, especially in sub-Saharan Africa’ (OXFAM International 2008:2). Those already in poverty will find it more difficult to obtain sufficient food to keep from starvation.

### **2.1.2 Disease**

#### *i HIV/AIDS*

Additional factors add pressure to the worldwide poverty situation. According to the 2002 report by the World Health Organization [WHO], Human immunodeficiency virus [HIV]/AIDS,<sup>4</sup> tuberculosis [TB] and malaria claimed 5.7 million lives globally in one year alone and caused debilitating illness in many millions more (WHO 2002). The report states: at the beginning of 2001, ‘more than 36 million people lived with HIV/AIDS worldwide ... (with) (a)bout 14 million women of childbearing age currently infected with HIV ...’ (WHO 2002:Intro, 1).

In 2008, the Joint United Nations Programme on HIV/AIDS [UNAIDS] presented some positive statistics showing that since 2000, the global percentage of people living with HIV seems to have stabilised, although the overall number of people living with HIV has increased as a result of the ongoing number of new infections each year and the effects of more widely available antiretroviral

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<sup>4</sup> HIV: *human immunodeficiency virus*; AIDS: *acquired immune deficiency syndrome*

therapy (UNAIDS 2008:5). But the stabilisation of the epidemic remains at an unacceptably high level. In 2007, there were an estimated 33 million people living with HIV and the annual number of new infections declined from an estimated 3 million in 2001 to 2.7 million (UNAIDS 2008:5). 'Sub-Saharan Africa remains most heavily affected by HIV, accounting for 67 percent of all people living with HIV and for 72 percent of AIDS deaths in 2007' (UNAIDS 2008:5).

By 2001 the worldwide impact of HIV was startling with over 21 million people, including 4.3 million children, having died since the start<sup>5</sup> of the epidemic (WHO 2002:Intro, 2). Furthermore, by 2007 the disease had left an estimated 15 million orphans, almost double the number of orphans reported in 2001 (UNAIDS 2008:218). These facts help to underscore the close link between HIV infection rates and poverty where orphaned children must either provide for themselves or become dependent upon the good will of other relatives or friends who may already be struggling to survive. Chronic illness associated with HIV/AIDS has already caused increased financial pressure upon the family with an infected member. The death of one or more parents due to the disease places the surviving relatives into an ever-diminishing pool of financial resources. And the disease strikes those that can least afford it. 'Ninety-five percent of all HIV infections occur in developing countries, especially in sub-Saharan Africa, dramatically cutting life expectancy' (WHO 2002:Intro, 2). Coupled with overall poor health, chronic illness is one of the main reasons why the poor stay poor. 'Infections lead to poverty, and poverty leads to infections'

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<sup>5</sup> AIDS was first reported 5 June 1981, when the US Centers for Disease Control [CDC] recorded a cluster of *Pneumocystis carinii* pneumonia (now still classified as PCP but known to be caused by *Pneumocystis jiroveci*) in five homosexual men in Los Angeles.

(WHO 2002:Intro, 1). For every person who dies, many more live on but are unable to regularly work or adequately provide for their daily needs.

## *ii Tuberculosis [TB]*

It is estimated that 2 billion people across the globe are carriers of tuberculosis bacillus, the mycobacterium that can lead to active TB (WHO 2002:Intro, 2). Statistics provided by the Kaiser Family Foundation [KFF] state that every year nearly 1.7 million people die from the disease and 9,157,000 new cases develop (2007a:1). Most TB sufferers are poor people between the ages of 15 and 54 living in developing countries. Without increasing current efforts to control TB, nearly 1 billion additional people will become newly infected with TB, 200 million people will become sick, and 35 million will die of the disease by the year 2020 (WHO 2002:Intro, 2).

Due to suppressed immune systems, people infected with HIV are far more likely to develop active TB. Over the past decade, the number of TB cases in several African countries has grown exponentially due in large measure to the HIV epidemic. The number of people co-infected with TB and HIV has already climbed to over 10 million (WHO 2002:Intro, 2).

Disease exacerbates already difficult living conditions for those in poverty and becomes a significant obstacle preventing them from finding relief. Through recurrent bouts of illness, adults are prevented from working, thereby reducing the income and food available to families. Moreover, since deaths due to AIDS and TB occur mainly among working-aged young adults with dependent



children, ‘these diseases are creating a generation of orphans growing up in deprivation, lacking parental support and guidance, unable to complete even primary school and virtually condemned to a life of poverty’ (WHO 2002:Intro, 4). Active TB can cost a household’s main provider 20-30 percent of the family’s annual income; if this person dies 15 years of income will be lost (WHO 2002:Intro, 4). The effects of disease upon a family already in poverty can be devastating. Globally, the costs of TB alone upon the poor is estimated at US \$12 billion (WHO 2002:Intro, 4).

### *iii Malaria*

KFF research suggests that out of an estimated 247,000,000 who suffer from malaria, an estimated 881,000 people per year will die from it (2007b:1). Hundreds of millions of people, mostly in sub-Saharan Africa, suffer acute attacks of malaria-induced fever, often several times each year. Many of these sufferers are children (WHO 2002).<sup>6</sup>

Malaria often acts together with other diseases, respiratory infections and malnutrition to prey upon the most vulnerable. Although insecticide-treated nets offer children a very high level of protection against malaria, less than 5 percent of those at risk sleep safely under them (WHO 2002:Intro, 3). In high malaria-incidence countries, pregnant women in particular are at a much greater risk of contracting malaria.

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<sup>6</sup> ‘During the year 2000, 906,000 children under the age of 5 succumbed to the disease’ (WHO 2002:Intro, 3)

Malaria infection during pregnancy may cause a host of problems for both the mother and the unborn child. It can cause maternal anaemia, which raises the rate of maternal deaths. Risk of miscarriage and stillbirth are also increased, while babies born to mothers infected with malaria often have low birth weight which adversely affects the health and development of the young child (WHO 2002).

HIV/AIDS, TB, and malaria are major agents in global disease incidence. However, there are other conditions such as lack of access to clean water, inadequate and insufficient sanitation and compromised overall health that ravage those in poverty, exacerbating already difficult living conditions. The World Bank reports that 1 billion do not have access to safe water and 2.5 billion do not have adequate sanitation, leading to high infant mortality rates and increased death from infectious and parasitic diseases such as diarrhoea (WDR 2004 in Sider 2005:11). Weakened immune systems provide little defence against such invaders; insufficient and inadequate health care leaves those that become ill with very little hope of becoming well.

Another significant impact of poverty on global health is that of protein deficiency, particularly in toddlers. Eighty percent of total brain development occurs between conception and age two. Adequate protein intake necessary for proper brain development is lacking in over one third of children under the age of 5 in developing countries, resulting in diminished learning capacity and reduced overall mental ability, thereby handicapping whole communities (Sider 2005:12).

Many elements combine to make up the global poverty picture. Although a commonly agreed upon definition is problematic, anyone can easily recognize the signs of poverty. Roughly 2.7 billion people in the world live on less than two dollars per day. That figure, combined with the toll exacted upon humanity through disease, leaves many around the world without hope. HIV/AIDS, TB and malaria seem to prey upon those who are least able to defend themselves.

## **2.2 The South African picture**

### **2.2.1 Poverty**

Although it is certainly as difficult to obtain precise statistics on the local or national scale as on the global scale, poverty, with its many contributing factors, is undoubtedly a serious social problem in South Africa. In 2003, the UNDP published its South African Human Development report (UNDP 2003). Among other things, the publication reported on changes in income poverty and inequality, indicating that both levels had been increasing during recent years. Despite this, the report stated that if one uses a national poverty line value of R354.00 per month (based on 1995 rates) for a food parcel that would satisfy very basic nutritional needs, the total percentage of people living in poverty had fallen from 51.1 percent in 1995 to 48.4 percent in 2002. When comparing poverty rates using the international poverty lines of one and two dollars per day, it was found that in 2002 the \$2 two dollars per day rate had fallen from 24.2 percent to 23.8 percent of the total population. However, between 1995 and 2002 the one dollar rate—the rate often regarded as the measure of

extreme poverty—had risen from 9.4 percent to 19.5 percent (Studies in Poverty and Inequality 2007:7). This means that over 43 percent of the total population, roughly 20.9 million people, was under the two dollars per day international poverty line rate.<sup>7</sup>

In addition, as published by the 2008 Western Cape Provincial Economic Review and Outlook [PERO], the Consumer Price Index of food (CPI-food) had risen by 15.7 percent between April 2007 and April 2008, meaning South Africa had been experiencing the highest rate of food inflation since January 2003. Especially worrying was the fact that the prices of certain staple foods had increased significantly: white bread—26.3 percent, brown bread—21.5 percent, and potatoes—29.3 percent. Even cooking oil, often used more heavily in poorer communities, increased by 102.9 percent over the period (PERO 2008:114).

### *i Poverty and unemployment*

Poverty exists in South Africa on a massive scale, with many individuals struggling to simply survive. Insufficient resources can result from a combination of many factors. But much of this poverty has a direct correlation to the national employment figures. Jacoba Richards argues that one of South Africa's most serious and intractable socio-economic problems is unemployment (2003). The unemployment rate in South Africa is one of the highest in the world, and Geeta Kingdon and John Knight, using the broad definition which does not require a job-search test for statistical measurement,

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<sup>7</sup> The population of South Africa is estimated to be 48,577,000 in 2009 (WHO 2009:145).

put it at 36 percent to 42 percent (2005:1).<sup>8</sup> Even if the narrow definition which applies a job search test is used, 25-30 percent of adults who wanted work and actively looked for it remained unemployed. Different groups reveal abounding disparity in employment figures among race, gender, age, education and region categories (Richards 2003). Since household income relies heavily on employment income in South Africa, Kingdon and Knight highlight the fact that ‘... the varying incidence of unemployment across different groups has important implications for the distribution of income and for the incidence of poverty’ (2005:1).

Unemployment is distributed inequitably in South Africa, with certain groups being much more likely to enter it and stay in it than others. More specifically, young and uneducated Africans living in homelands and rural areas are most likely to be unemployed (Kingdon & Knight 2005). Millions of South Africans face the prospect of never finding employment in any sector of the economy, thereby missing the financial and other benefits that employment provides. The poverty that results to a large extent from unemployment becomes a basis for total exclusion from the system, barring people from ever fully functioning in society. ‘Unemployment has replaced race as the major factor in inequality, and is a major factor behind the widening socio-economic inequality in the population at large ...’ (Schlemmer & Levitz 1998:Preface).

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<sup>8</sup> The official definition of unemployment is: ‘Persons aged 15-65 years who did not have a job or business in the seven days prior to the survey interview but had looked for work or taken steps to start a business in the four weeks prior to the interview and were able to take up work within two weeks of the interview’ (Statistics South Africa 2005:ii).

But two features are particularly striking about South African unemployment. First, rural unemployment rates are higher than urban rates, something which is atypical among other countries and can be explained by historical policies restricting mobility. Secondly, according to Kingdon and Knight, the majority (62 percent) of the unemployed have never been employed (2005:2). They point out that there are many possible reasons for this and that '(t)he very long duration of unemployment (>1 year) among a high proportion (68 percent) of the unemployed suggests that the demand-side of the labour market is responsible for a good part of the unemployment' (2005:1). The argument is that there are seemingly insufficient jobs available for a large portion of the local population.

However, there is a general realisation among policymakers that '... many of the poor are simply unemployable because they lack certain basic skills demanded by the labour market' (Pauw & Mncube 2007:7). It is not that employment is unavailable, but that there are barriers in either accessing available jobs or being suitably qualified to fill them. Mamphela Ramphele, in her book *Laying ghosts to rest: dilemmas of the transformation in South Africa*, (2008:186) writes that 'South Africa's skills shortages ... undermine both the public and private sectors in their drive to sustain the momentum of the growing economy.'

Jeremy Seekings explains that the effects are accentuated by the growth of an 'underclass' who suffer 'systematic disadvantage in the labour market with the result that they face no real possibility of escaping from poverty' (2007:17). Poverty is transitory for many unemployed people when they find employment.

But others lack the skills (including language skills), social development and connections (i.e., social capital) which are foundational for securing employment.

## *ii Poverty and crime*

Gabriel Demombynes and Berk Özler (2006) report that crime is considered one of the most difficult of the many challenges facing South African society in the post-apartheid era; the country's crime rates are among the highest in the world. Crime exacts many direct and indirect economic costs in South African society beyond the pain and loss suffered by crime victims. Substantial resources are diverted to installing security systems, health costs rise due to increased stress and physical injury, and the threat of crime creates an environment difficult for productive activity. According to Demombynes and Özler , economic growth has been hampered due to the widespread emigration of skilled professionals which can be at least partly attributed to their desire to escape a high crime environment (2006). These factors all work together to discourage meaningful investment and stifle long-term growth throughout the country.

Although crime exists in many forms without physical deprivation, poverty and inequity often play a significant role in the incidence of crime. It is also the leading cause of injury and death among poor people in South Africa (Budlender 2000).

According to Khanyisile Mpuang, 'most South African offenders are uneducated, unemployed and impoverished, and due to these social and economic circumstances often believe themselves driven to a life of crime' (2005:1). There are high levels of frustration in communities where there is no hope for self-actualisation through meaningful employment. Demombynes and Özler have cautioned that people 'who perceive their poverty as permanent may be driven by hostile impulses rather than rational pursuit of their interests' (2006:290). Richards similarly points out that the absence of 'basic socio-economic necessities for the majority of South Africans has contributed towards committing crime as a means of survival' (2003:61). This reactionary response can also be seen as an 'occupational choice model in which the incentives for individuals to commit crime are determined by the differential returns from legitimate and illegitimate pursuits' (Demombynes & Özler 2006:289). Crime rates will likely remain high unless efforts are made to enable offenders and potential offenders to escape these restraints.

### *iii Poverty and disease*

Rampant disease in any society will greatly impact poverty figures because recurring illness means decreased productivity and extensive financial resources being dedicated to returning to health. Almost twenty percent of the South African population is heavily impacted by two debilitating diseases: HIV/AIDS and TB. This section will highlight the impact of these two diseases in the general population of South Africa as it relates to poverty.



## ▪ HIV/AIDS

Recent statistics are disturbing: close to 6 million people are living with HIV/AIDS in South Africa, making it one of the countries hardest hit by the AIDS epidemic (KFF 2008:1).<sup>9</sup> The stark reality is that the hardship caused by HIV/AIDS has a direct bearing on poverty. Studies estimate that the opportunity costs due to the impact of HIV/AIDS on South African society are equivalent to lost economic growth of 1-1.5 percent Gross Domestic Product [GDP] per year. Ramphele (2008) believes this may actually underestimate the long-term costs.

In 2007, an estimated 350,000 South Africans died of HIV/AIDS and AIDS was cited as the major cause of premature deaths in the country. The disease primarily strikes young, adult South Africans, decimating family structures and already leaving at least 1.4 million children orphans<sup>10</sup> (KFF 2008:2). As WHO points out, these children growing up without parental support and guidance are often unable to complete primary school, thus virtually condemned to living a life of poverty should they survive (2002:4). Ramphele laments that struggling extended family structures absorb these orphaned children, often stretching already meagre resources and pushing families deeper into poverty (2008). Children without extended family become heads of impoverished households, putting them and their siblings at extreme risk. Many drop out of school and find themselves vulnerable to exploitation that may make them further victims of the pandemic.

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<sup>9</sup> An estimated 5,700,000 people are believed to be living with HIV/AIDS in South Africa, the highest number of any country in the world. It is estimated that 18.1 percent of the adult population in South Africa is living with HIV/AIDS (KFF 2008:1).

<sup>10</sup> The estimated number of children who have lost their mother or father or both parents to HIV/AIDS and who were alive and under age 17 in 2007 (UNAIDS/WHO 2008:2).

HIV/AIDS and associated diseases also increase the personal health care costs for poor families. Those living with the virus are frequently unable to work due to their illness, which reduces the income and food available to families (WHO 2002). The chronic nature of the disease is a particularly heavy drain on family financial resources. Spending on medical treatment, drugs and traditional remedies is costly and when cash runs out households sink even deeper into poverty and inescapable destitution (WHO 2002).

Furthermore, HIV/AIDS places an increased financial burden upon the National Budget, absorbing money that could be used to proactively meet other needs.<sup>11</sup> The South African government has been scaling up access to antiretroviral [ARV] therapy and will continue to do so over the next few years as the country enacts its 2007-2011 Strategic Plan at great cost to the economy (KFF 2008:1). But it cannot afford not to make the investment. Although the country has the largest number of people on ARV therapy in the world (estimated 460,000), it also has the highest unmet need for this crucial treatment, an estimated 1.7 million people (KFF 2008:1). Thus, the HIV/AIDS pandemic has created a huge financial drain on the economy, both at a personal and a national level.

- Tuberculosis [TB]

The statistics for tuberculosis published by the US Agency for International Development [USAID] are equally troubling, with South Africa ranking fourth on the list of 22 high-incidence tuberculosis countries in the world (USAID Health

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<sup>11</sup> In 2007, the budget for national HIV/AIDS programs was estimated to be R3.4 billion (approximately US\$480 million) (KFF 2008:2).

2008:1). According to the 2009 World Health Organisation Global TB report, South Africa had nearly 461,000 new TB cases in 2007, an incidence rate of nearly 948 cases per 100,000 of the population (2009:145). Despite the worldwide decrease in new TB cases since 2003, South Africa recorded the world's second highest rate of new cases in 2006 [after Swaziland]. Kerry Cullinan reports that more people died of TB in South Africa that year 'than in any other country in the world—some 218 per 100,000' (2008:1). However, according to WHO that figure has since increased to 230 per 100,000 (2009:145). To further complicate matters, multi-drug resistant TB, largely caused by inappropriate drug regimens and non-adherence to appropriate ones, is on the rise with reports confirming that South Africa has the highest number of multi-drug resistant [MDR] and extensively drug resistant [XDR] TB infection rates in the southern African region—8.5 percent of all TB infections (WHO Report 2009:145).

#### *iv Poverty and education*

In South Africa, between 1996 and 2001, there have been slight gains in the numbers of people who had completed high school or tertiary education. However, this does not change the fact that one out of three South Africans aged 20 and over has not completed primary school or has not had any formal schooling. Statistics South Africa (2001) puts the percentage of successful matriculants at a meagre 23.9 percent of the total population. These figures are definite cause for concern as there is a strong correlation between poverty and a lack of education. Education is closely linked with economic advantage.

Basically, the poor remain in poverty because they do not have jobs or because the jobs they have do not provide sufficient income. 'The principal asset of the poor is labour time, and education increases the productivity of this asset' (Richards 2003:63).

For an individual, a better education offers the possibility of a better income. For society, a better-educated population leads to higher economic growth throughout the community and the nation. The expansion of literacy and basic education yields remarkable dividends, to the point that even minimal education greatly increases a person's skills and employability, raises one's ability to relate to the outside world and increases self-confidence and a sense of dignity (Richards 2003). Access to basic education is a critical tool for empowering the poor. 'Education is one of the most important factors determining employment and thus income. The lack of education ... has deprived many people of their dignity and their ability to look after themselves' (Richards 2003:64).

But despite the expenditure of roughly 7 percent of the GDP on public education, most young South Africans leave school with limited skills and enter the labour market unequipped for skilled or even semi-skilled employment. Since the economy is structured around skilled labour, there is little opportunity for the majority of these young adults to find a way into the existing labour pool. As Seekings suggests, this 'fuels unemployment among the unskilled and low earnings among those unskilled workers who are lucky enough to find jobs' (2007:19).

### 2.2.2 Summary

Poverty is a serious problem in South Africa, not only manifesting in the lack of sufficient income, but carrying with it a host of other complicated issues. Most often, poverty results from unemployment because without work there is no money available for support. But in the South African context other factors contribute to increased stress for those in poverty.

With one of the highest rates in the world, crime remains one of the most difficult of the challenges facing South Africa, exacting a high toll upon the South African economy. Although crime exists in many forms apart from poverty, poverty often plays a significant role in the incidence of crime. Local economic growth has also been hindered by the emigration of highly-skilled workers, many citing the desire to escape a high crime environment as a substantial reason behind such action.

Disease prevents many from being able to get beyond the struggle to merely survive as chronic health issues make it difficult for many citizens to remain in regular employment. Those in poverty have few resources to cushion the costs of healthcare or allow legitimate absenteeism while protracted illness for most is financially devastating. HIV/AIDS and tuberculosis together place an immense financial burden on individuals and society. Mainly impacting people of child-bearing age, these diseases bring financial ruin to families as well. Moreover, the many deaths due to HIV/AIDS have left many orphans, plunging these unfortunate survivors even deeper into poverty.

Despite considerable expenditure on public education with the intention of bringing many out of poverty, most young South Africans leave school with limited skills, ill-equipped to face the ever-increasing demands and challenges of the labour market. There seems to be little opportunity for many South Africans to find employment in an economy built around skilled labour.

### **2.3 The Western Cape, Cape Town, and Langa picture**

Against this backdrop of global and national poverty it is important to examine poverty as it relates to the local setting, thereby facilitating a comparison of the previously highlighted findings with local indices to help identify the need for intervention. While it has been shown that assistance is required globally and nationally to help bring people out of poverty, is similar assistance needed in the Langa community? Does this local community manifest those poverty-related issues that are generally reflected around South Africa?

The Western Cape is one of nine provinces in South Africa, with Cape Town as its largest city and Langa its oldest township. Langa was established in 1927 after the residents of Ndabeni were forcibly moved there. Keri Delpont and Roché van Wyk, quoting the National Census of 2001, report that Langa is home to 49,666 people of which 99.58 percent were identified as being black, 0.39 percent coloured, and 0.02 percent white (2008:3).

### 2.3.1 Unemployment

Unemployment figures for the Western Cape, including Langa, differ widely mainly along racial lines. Ebrahim Rasool, the former provincial Premier helped to define the broader issue regarding unemployment in his 2004 State of the Province address:

Along with the rest of South Africa, the Western Cape suffers a crisis of unemployment. 23.16% of the Western Cape's economically active population is unemployed. This figure hides dramatic racial differences. For example, 41,52% of economically active Africans and 22.37% of economically active Coloureds are unemployed compared to 6.89% of Whites. These patterns are likely to remain in place since we also know that only 3 out of a 100 Africans who enter the labour force find a job compared to 92 out of a 100 whites. Likewise, youth unemployment in the Western Cape is unacceptably high in that Youth unemployment represents over 80% of the total unemployment (2004:6).

When considered in the light of racial discrepancies, these employment figures are rather alarming and cause for great concern.

In 2004, the URDR estimated the unemployment rate in Langa as being 43.9 percent (2004:16), reflecting the low figure of those still actively seeking work. With 27.19 percent of its residents living in informal housing (known locally as 'squatter shacks'), the community is truly impacted by high poverty (Census 2001 in Delport & van Wyk 2008:3). The employment figures of Rasool's address, even in 2004, painted an especially bleak picture for the black residents of the Western Cape, including Langa. If only 3 out of 100 blacks entering the labour force find work, it appears that, using the current strategies employed by government and others, there is little possibility of improving the poverty picture in communities like Langa and unemployment figures will instead rise rapidly

### 2.3.2 Crime

According to research done by URDR (2004:34), violent crime plagues the Langa community. Violent crime/assault figures range from 1.6 percent to 3.11 percent greater than the average crime rates for other police stations throughout the Cape Town metropolitan district. Sexual crimes including rape are 1.74 to 3.64 percent higher than the average crime rates for other police stations in Cape Town. The following *Table (2.1)* compares crime rates for the City of Cape Town with actual crimes recorded by the Langa police precinct for the Langa community:

*Table 2.1 Crime statistics for the city of Cape Town and Langa*

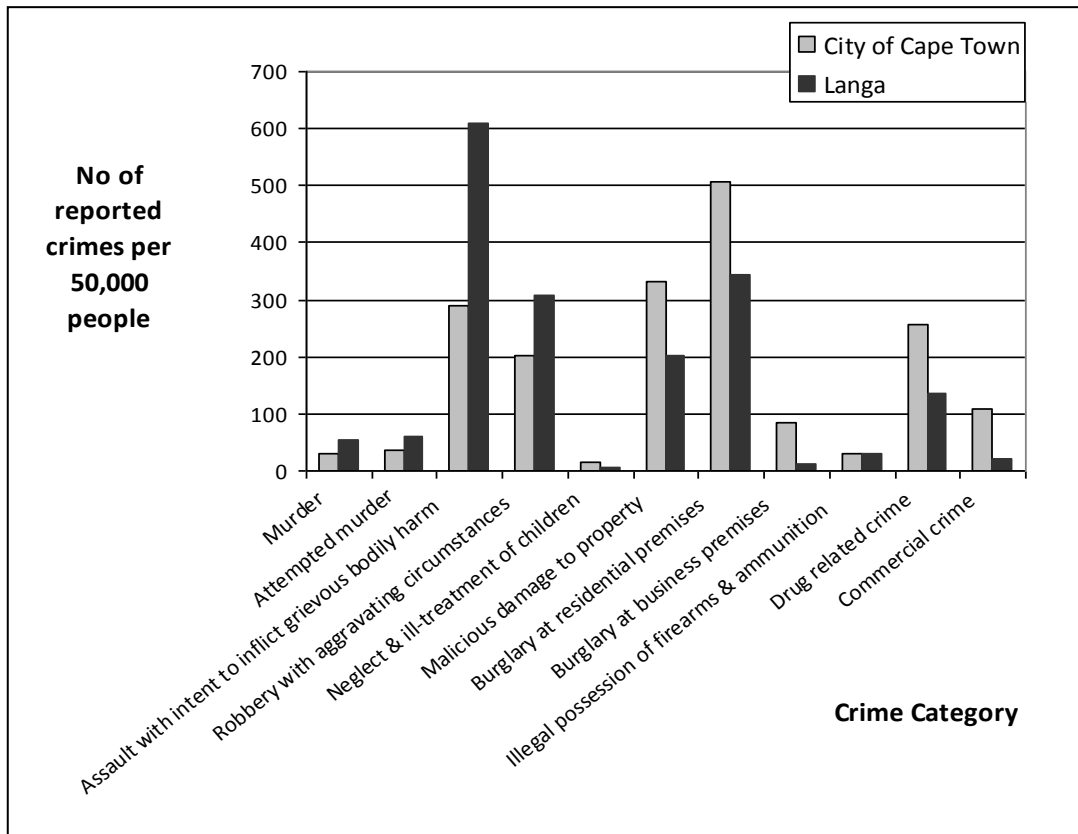
Crime Category	City of Cape Town	Langa
	No. of reported crimes per 100 000 people, 2004-2005	Actual no. of reported crimes, April 2004-March 2005
Murder	59.1	55
Attempted Murder	69.6	59
Assault with intent to inflict grievous bodily harm	580.3	608
Robbery with aggravating circumstances	406.1	307
Neglect and ill-treatment of children	31.1	5
Malicious damage to property	662.6	203
Burglary at residential premises	1016.4	343
Burglary at business premises	170.0	11
Illegal possession of firearms and ammunition	60.4	29
Drug related crime	511.8	135
Commercial crime	214.7	21

(PERO 2006:24)

In the above table (2.1), Cape Town crime rates are actual crime numbers reported per 100,000 population. The Langa numbers are actual crime numbers for a population of slightly less than 50,000, meaning that the actual reported crime numbers should be doubled for Langa to achieve parity with the



City of Cape Town. *Figure 2.1* below indicates the comparison based upon a population of 50,000 people.



*Figure 2.1 Comparison of reported crimes in Cape Town and Langa, 2004/5 (Crime Table compiled from SAPS 2007)*

For example, while Cape Town reported 59.1 murders for the 2004/05 period per 100,000 people, Langa had 55 murders for a population of approximately 50,000 people, meaning that its reported murder rate was nearly double that for the entire Cape Town metropolitan region. Again, from April 2004 to March 2005, reported robberies with aggravating circumstances in Langa were nearly double with 307 per 50,000 of the population compared to 393 incidents per 100,000 for the Cape Town metropolitan region. Other reported categories reflect similar rates, although the recently changed definitions of rape and

indecent assault in the Sexual Offences and Related Matters criminal law (Amendment Act [32 of 2007]), make it difficult to compare these particular figures.

Currently there are 1,905,821 young people between the ages of 15 and 34 in the Western Cape. Specific studies on youth in conflict with the law done by the Department of Social Development indicate that the Western Cape is the province with the highest incidence of youth crime, with high levels of rape, sexual assault and murder. From December 2005 to December 2007 the number of youth awaiting-trial-in-detention increased from 6,558 to 8,800 and alarmingly, continues to rise. As a result of the violent behaviour among the youth, especially among the males, the Province also experiences a high burden of mortality among young men (PERO 2008:112).

When social and human capital is low, the social fabric of society begins to disintegrate. In large parts of Cape Town this manifests as high incidences of drug and alcohol abuse, gang affiliation, crime against property and people, especially women and children (City of Cape Town—5 year plan for Cape Town, Integrated Development Plan [IDP 2008:4-5]).

Since a high crime incidence has major implications for community safety and social capital, the staggeringly elevated occurrence of crime in Langa portrays a community in great need.

Efforts to combat crime, and thus reduce crime incidence through increased policing, are severely hampered by the overall serious shortage of police stations and available police officers in Cape Town. To adequately police the Cape Town metropolitan region, it is estimated that a total of 90 police stations is needed—currently there are just 56 stations (PERO 2006:24).

### 2.3.3 Healthcare

In the Western Province, health care is in similar crisis with HIV/AIDS and TB posing significant challenges to the local health care sector. Together these two infectious diseases constitute a significant portion of the overall disease burden in the Province and rank among the top 3 causes of premature mortality. Furthermore, the HIV/AIDS epidemic has further exacerbated the TB epidemic within the Province. In 2006, the HIV/AIDS provincial prevalence rate was at 15.1 percent. The prevalence of HIV infection was occurring at a more rapid pace in the 1990s than has been the case for the current decade, levelling off since 2004. This could be attributed to a maturing epidemic (PERO 2008:109).

But, according to the Ante-natal Clinic Survey of 2003-2004, there are specific problem areas in Cape Town where the prevalence of HIV/AIDS is highest. These include Gugulethu/Nyanga and Khayelitsha with respective prevalence rates of 28 and 27 percent (PERO 2006:24). Although the HIV/AIDS prevalence rate for neighbouring Langa was not measured separately, one would reasonably assume that, due to similar community composition, it would have an equally high rate.

From 1997 to 2007, TB incidence per 100,000 increased in the Western Cape by almost 50 percent. Despite the large increase over the 10-year period, interventions within the health sector are starting to show a decline in the TB incidence rates from that 10 year high of 1,041 per 100,000 in 2005 to 1,004 per 100,000 in 2007 (PERO 2008:109). In spite of apparent improvement, Cape

Town still only has a TB cure rate of 71 percent, especially low when compared to the national target of 85 percent (PERO 2006:25).

The burden of disease for the province shows that the top five causes of premature mortality in the Western Cape are: HIV/AIDS—14 percent, homicide/violence—12.9 percent, TB—7.9 percent, road traffic injuries—6.9 percent, and ischemic heart disease—5.9 percent (PERO 2008:129).

There are major concerns for the health sector that arise from the evidence that HIV/AIDS and TB combined represent 22 percent of the provincial health burden. Data on both HIV prevalence and TB incidence show an increasing trend since 1997, although the rate of increase levelled off in recent years (PERO 2008:129). These dual epidemics will continue to pose a serious challenge to the public health sector and dealing with these epidemics must remain a national and provincial health priority.

There are other challenges facing the health care sector in the Western Cape, but perhaps two of the most pressing ones directly impact quality care throughout all sectors in the City of Cape Town. First, there is a shortage of approximately 100 healthcare facilities, which directly impacts negatively on the quality of healthcare services provided (PERO 2006:23). Secondly, and equally important, there is a critical shortage of health professionals, especially nurses (PERO 2008:129). The high HIV and TB infection rates have placed great strain on already limited personnel resources evidenced by high provincial nurse-patient ratios of 54:1 (PERO 2006:23).

### 2.3.4 Education

The final area of local consideration is education. Social infrastructure plays an inhibiting role here as well with a current shortage of 156 school facilities being reported in Cape Town alone (PERO 2006:22). Educational achievement can be best summarized by considering the literacy and numeracy results for the Province. But these are not encouraging, with results considered mixed at best. PERO suggests that South Africa's poor performance in international learning tests, such as the Trends in International Mathematics and Science Study and the Progress in International Reading Literacy Study, points to serious challenges regarding the quality of education, both on a local and national basis (2008:116).

National assessments of learner achievement such as the Senior Certificate Examination and the national standardised achievement tests (Systemic Evaluation) similarly indicate slow progress towards the realisation of quality education for all learners. But according to the Western Cape Socio Economic Profile (PERO 2008:117), Grade 3 learners have shown improvement in literacy results. The percentage of learners attaining acceptable outcomes increased from 39.5 percent in 2004/05 to 47.7 percent in 2006/07. In striking contrast, numeracy results for Grade 3 learners have deteriorated over this period, declining from 37.3 percent in 2004/05 to 31 percent in 2006/07 (PERO 2008:117).

Disparities in school-funding patterns seem to be reflected in educational accomplishments. Achievement in terms of equality of outcomes between least

advantaged and most advantaged schools show that in 2006/07, Grade 3 learners in the least advantaged schools attained average literacy levels that were 62.5 percent lower than the average for the most advantaged schools. Numeracy results showed that learners in the least advantaged schools attained numeracy levels that were 82.6 percent lower on average than the most advantaged schools. Thus, despite some progress in increased funding to the poorest schools in an attempt to narrow the gap in learning outcomes, achievement rates for literacy and numeracy are closely linked to poverty levels (PERO 2008:117).

Measureable learner achievement is mixed. Results from the testing of Grade 6 learner's literacy levels indicate an increase from 42.1 percent to 44.8 percent of learners attaining acceptable outcomes from 2005/06 to 2007/08. However, there was a decline from 17.2 percent to 14 percent in the number of learners attaining acceptable numeracy outcomes over the same period (PERO 2008:117).

In addition, there has been an increase in the number of learners who wrote the Senior Certificate Examination, increasing slightly the number of learners who passed. However, even with these numerical increases the number of learners achieving exemptions and A-aggregates has been virtually unchanged since 2002 (PERO 2008:117).

Similarly, the number of learners passing Higher Grade Mathematics has fluctuated from 3,092 (8.32 percent) in 1999 to a high of 4,321 (11.2 percent) in

2005 while the number and percentage of learners passing Higher Grade Mathematics in 2007 dropped to 3,990 (9.52 percent) (PERO 2008:117).

What these figures all seem to indicate is that, while test scores for some Western Cape learners have shown some improvement, corresponding declines in other scores indicate that real progress is not being made in children's basic education. The marginal improvement shown for some Grades in certain areas does not indicate significant overall gains in primary and secondary education. At some level there seems to be a direct correlation of results to funding levels, although there is no specific data indicating that increased funding alone brings about positive change.

Identifiable education figures specific for the Langa community are difficult to obtain. However, Delpont and van Wyk explain that the information available seems to indicate that most of the population has had at least some level of schooling, with an impressive 83.38 percent of the residents having completed Grades 1-12 according to the Census 2001. Only 7.15 percent have no schooling history (2008: 3).

## **2.4 Summary**

Local patterns in Langa and the Western Cape confirm what is evident on a national scale: many residents of South Africa, and more specifically Cape Town and the Langa Township, are struggling under crippling poverty. Most of those in poverty will find it difficult to break out of the entrenched patterns that

prevent their full entry into society. The inability to do so relates directly to a few key issues.

First, unemployment figures are incredibly high (43 percent in Langa) and follow closely along racial lines. Since Langa residents are primarily black, current employment patterns will keep much of the Langa population in poverty without a successful intervention that changes the status quo.

Second, crime rates are much higher in Langa than they are on average throughout the Western Cape. There must be a focused effort that attacks the root causes of crime, repairing the 'social fabric' of the Langa society.

Third, health care is in crisis. HIV/AIDS and TB infection rates are high, though not as high on average as those seen in the rest of the country with areas of similar racial composition. The critical shortage of nearly 100 provincial health care facilities and the shortage of health care professionals further challenges the quality of health care. One could rightly assume that both of these shortages would also have a bearing on the quality of health care in the Langa community.

Finally, educational achievement is necessary to lift one out of poverty. Low test results for both literacy and numeracy show that learner achievement rates correlate to levels of funding. Though there is no specific evidence to show that increased funding levels alone make up this difference, the learning process is enhanced in schools where teacher/pupil ratios are generally much lower, as is



the case in advantaged schools. Quality education is necessary for lifting people out of poverty, yet it appears that little progress in educating the majority of the Western Cape's children has been made. Poverty is closely linked to unemployment and much unemployment follows trends indicating a general lack of basic educational skills in the unemployed. The Langa community follows similar patterns and shows itself to be in need of focused intervention. Richards (2003:60) quotes the point made by Kothari (1993:128) when he states that '[a] prime concern of all development efforts should be to generate employment ...' Helping people become employable confronts issues around poverty and must be multi-faceted to address challenges endemic in society. Strategic efforts must be generated toward that end to help bring about poverty alleviation in the Langa Community.

### **3 Conclusion**

There is some debate about the precise definition of poverty, but there is little debate over the fact that poverty exists, a reality of life for millions worldwide. While features and levels of poverty can be described in the global context, the primary focus of this project is the South African context as it details poverty nationally and as it is found in the Langa community. Poverty isn't just defined as a lack of income, but it contains an array of issues that combine to form a situation from which it is nearly impossible to break free. The social ramifications of poverty are part of the cycle that adds to the burden, from chronic unemployment and poor health, which can often be compounded with HIV/AIDS and other related diseases, to crime and substance abuse. The result

is that those in poverty are trapped, unable to make a way forward through the despair and hopelessness.

The situation in Langa reflects the national picture. Adding to the difficulties experienced by those in poverty is a systems failure regarding employment, crime prevention, health care, and education. Unemployment often follows racial lines, making it particularly difficult for Blacks to find work in the greater Cape Town area. Police stations are too few in number with insufficient staffing to have an impact on local criminal activity while health care faces similar facilities and staffing shortages. Finally, low test scores by learners indicate that the education system seems inadequate to handle the challenges of teaching. The result is that those in poverty must somehow overcome a system that is functioning poorly, further entrenching poverty. Generating employment must be a prime concern in any poverty alleviation scheme if there is to be any lasting upliftment and social transformation in the Langa community.

## CHAPTER 3

### WHY IS THIS HAPPENING?

'One way or another, we are all going to die, regardless of whether a cop shoots you or you were ill.' Angie Molebatsi, ANC MP at the funeral of Olga Kekana who was killed by police after they mistook the car she and three friends were travelling in as being hijacked and shot into the vehicle. The police then left the scene. (Cape Times, 19 October 2009)

#### 1 Introduction

Careful and thorough examination of the surrounding context should result in one gaining a realistic appraisal of the current situation, providing the foundation from which to define the specific problems. This awareness of the processes that brought things to their current state is critical for properly understanding the problems at hand. Therefore, it is important to have a firm grasp on the reasons for things being the way they are so that effective solutions can be formulated within a contextual framework to bring about significant change. Interventions that are put into place without such understanding may invariably fail to address the root causes of the problem or could potentially create even further difficulties.

This chapter looks at some of the damaging legacy forced upon the South African society by almost five decades of apartheid and its ongoing impact long after democratic elections in 1994. Although the system itself was dismantled towards the end of the 20th century, the societal structures it created persist as

a scourge on many fronts, impeding or even preventing the transformation so desperately needed.

Government policies and legislation are also scrutinised as weighty contributors to 'the way things are,' with special focus upon educational policy and the costly failure to develop an appropriate HIV/AIDS strategy, thereby exacerbating the HIV/AIDS pandemic in South Africa and putting the nation at even greater risk. Experience confirms that governmental or community leaders can either facilitate vision by proactively tackling issues, or they can frustrate the efforts of others to bring about lasting solutions and further inhibit or even prevent progress.

Finally, this chapter reviews service delivery and the effect that defective provision thereof has upon major industries in particular and the nation as a whole. Education and health care are appraised in light of whether they properly provide services that ensure a well-educated and healthy population.

## **2 Legacy Of Apartheid**

Apartheid, meaning *separateness* in the Afrikaans language, was the legal system of racial segregation enforced by the National Party following its electoral victory in 1948. It remained in place until it was dismantled in a series of negotiations following the release of Nelson Mandela from prison in February 1990. Historians reveal that the introduction of apartheid was not the first establishment of legislated racism and racial subjugation in South Africa. The

arrival of Dutch colonialists to the shores of the Western Cape in 1652 normalised racism as a common element in the South African social landscape for hundreds of years by ushering in a system of rule that was based upon a hierarchy of race.

James Gibson states that apartheid was manifested in a 'body of legislation defining racial groups and delineating many of the crucial aspects of people's lives' (2004:30). He explains that by defining races, apartheid constructed four racial categories with respectively specified rights and responsibilities, namely, 'blacks (or Africans), whites, coloured people, and those of Indian origin' (Gibson 2004:31). This action would result in, among other things, a highly visible income poverty<sup>1</sup> and inequality throughout the nation cutting along racial lines. According to Seekings, apartheid perpetuated income poverty and increased income inequality because:

African people had been dispossessed of most of their land, faced restricted opportunities for employment or self-employment, were limited to low-quality public education and health care, and were physically confined to impoverished parts of the countryside or cities. At the same time, the white minority had benefited from discriminatory public policies .... Observers from all parts of the political spectrum turned to crudely dualistic descriptions of this reality, distinguishing between the 'first' and 'third world' parts of the country or analyzing the political economy in terms of 'internal colonialism' or (more bizarrely still) 'colonialism of a special type' (2007:2).

Although income-poverty standards were not considered high compared with the rest of Africa, the proportion of the South African population with incomes below the equivalent of the international poverty rate of 'one dollar per day'

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<sup>1</sup> Income poverty in its simplest sense is usually defined as the 'inability [of an individual or household] to attain a minimal standard of living', with (the) standard of living being measured in terms of consumption or income levels (Woolard & Leibbrandt 2001:42).

(adjusted for local purchasing power) was about 24 percent. This was much higher than other middle-income countries<sup>2</sup> (Seekings 2007:1). Although some African people had enjoyed upward mobility in the last years of apartheid, the majority of the population was poor in stark contrast to the conspicuously rich minority white population in power. Democratisation, therefore, brought high hopes that income poverty would be reduced, something that has not fully materialised<sup>3</sup> (Seekings 2007).

The overt aim of apartheid was the total segregation of blacks from whites which was achieved by the establishment of separate settlement areas called 'Bantustans' where blacks were forced to reside. Gibson believes that perhaps the ultimate degradation apartheid created was denying blacks citizenship in the very country of their birth and heritage (2004).

The impact of this humiliating debasement has found expression in the lives of generations of black people. Mamphela Ramphele, one of the founders of the South African Black Consciousness Movement [BCM], refers to the strong negative influences upon a 'personal psychological experience' (2008:16) of a person. Frantz Fanon is one of the first to identify this psychological aspect when he writes about the oppressive rule of the French in North Africa during the 1950s and '60s. His findings are particularly useful in defining the current South African context because he clearly exposes the debilitating consequences on the personalities and identities of the people subjugated by

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<sup>2</sup> Other African countries in comparison are as follows: 50 percent for Kenya, Swaziland, Uganda, and Senegal, 72 percent in Madagascar, and 85 percent in Zambia (Seekings 2007:1).

<sup>3</sup> The number of poor people has actually *increased*. Leibbrandt et al. (2004) conclude that both the numbers and proportions of poor people have grown (Seekings 2007:4).

colonial powers. Fanon explains that the oppressed become conditioned to see themselves and the world through the eyes of their oppressors because the hierarchically structured conditions of the subjugated lead them to believe that the oppressors and their culture are 'good' and the oppressed and their culture are 'bad'. Furthermore, the oppressed consequently become alienated from themselves and their own cultures (Fanon 1986). The symptoms of this condition include, 'a socially induced inferiority complex, self-hatred, low self-esteem, jealousy of those seen to be progressing (both black and white), suppressed aggression, anxiety, and sometimes a defensive romanticisation of indigenous culture' (Fanon in Ramphela 2008:16).

In the 1970's Steve Biko, the primary BCM founder and eventual political martyr, took up a similar theme. He believed that the most powerful weapon in the hands of the oppressor is the mind of the oppressed which eventually causes '... the oppressed to believe that he is a liability to the white man ...' (Biko 2004:74). Ramphela is convinced that a major challenge to South Africa's ongoing transformation lies, therefore, in finding the courage to acknowledge this 'scarring and set about reclaiming the "mind of the oppressed"' (2008:16).

Most of the efforts aimed at improving the situation tend to focus upon a simplified approach to problem-solving the visible social markers that need attention; for example, the erroneous but widely-accepted perception that unemployment issues can be resolved merely by providing jobs. But there are many deeper issues going beyond what is easily observed that need to be

considered when trying to find healing and permanent solutions to such complex problems. Once again, Ramphela provides helpful insight:

(H)uman beings ... are framed in significant ways by spiritual and psychological impulses that go beyond material needs. We are inclined to underestimate the importance of deep matters of the soul that distinguish humans from other members of the animal kingdom. We are at our best as human beings when our souls and minds are in harmony with what we do and how we relate to others. (2008:17)

Apartheid's legacy is not only seen in the structures created to prevent the fundamental freedoms of non-whites, but also in the 'cages' that have been erected in the minds of both whites and non-whites that continue to inhibit the new democratic reality. Apartheid indelibly impacted the psyches of all who have lived through its debilitating period.

The injury caused by apartheid was not exclusive to the mental integrity of its victims. When the African National Congress [ANC] political party came into power in 1994, it inherited a broken society needing far-reaching socio-economic reforms. Challenges included 'regenerating a stagnating economy just emerging from isolation and addressing the socio-economic divide' (van der Berg et al. 2005 in Pauw & Mncube 2007:2). This meant, according to Leibbrandt, Woolard and Bhorat, that government had to begin its work by 'breaking down the barriers that exclude people from participating in the economy on the grounds of race, gender or location' (2001:21).

Having been firmly erected during apartheid, the permanent breakdown of these barriers would require a transformation the scale and scope of which would be without precedence. Ramphela explains that it would require



'reorientation from past values and practices defined by racism, sexism, inequality and lack of respect for human rights towards the values reflected in our national constitution' (2008:13). This is a complex process, one that cannot be resolved quickly or easily.

Although one hesitates to place the blame for the ills of society at the feet of a single contributor, apartheid continues to leave its mark on South Africa even after its dismantling 15 years ago at the beginning of democracy. The intentional disenfranchisement of the majority black population together with the mistreatment of all other non-white races has left pervasive scars in individual and corporate psyches of South African communities still living in abject poverty. There are no easy answers to address the difficulties that remain for a new democracy seeking to bring about the transformation of a society that is still reeling from the effects of an oppressive apartheid regime.

### **3 Policies And Legislation**

Public policy decisions can have a powerful influence in positive and negative ways, demonstrating whether or not the government has properly defined the real issues at hand and is appropriately spending funding for the benefit of all its citizens. Together, with current legislation, these policies similarly play an important role in economic growth by regulating wages and working conditions that shape the economic growth path that further affects employment potential.<sup>4</sup>

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<sup>4</sup> New labour legislation was effected in the late 1990's by the post-apartheid government in the form of the Labour Relations Act 66 Of 1995, the Basic Conditions of Employment Act, [No 75 of 1997], the Employment Equity Act, No. 55 Of 1998], and the Skills Development Act 97 of

Although this section cannot attempt to assess government expenditure in its entirety, it audits a few principal programmes to determine how effective the return is on government investment for societal benefit.

This section also evaluates the impact of government policy upon the overall education system and HIV/AIDS treatment and prevention and how misguided policy and outright failures by those in leadership have been contributing factors to the tremendous challenges currently facing the nation.

### **3.1 Public expenditure**

Van der Berg, Louw, and du Toit describe three important evaluation factors that determine the efficacy of public spending:

- who the beneficiaries are of the spending, or the services that result from the spending;
- the monetary value of the service or benefit; and
- whether the spending achieves the desired benefit to the local populace, thereby determining the overall impact of the expenditure.

It is evident that there is still a big difference between groups of beneficiaries in South Africa (van der Berg et al. 2007).

Nevertheless, the government must be given credit for the policy changes that have brought economic resilience to the South African economy, thereby

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1998]. Although this legislation was thought to be novel, the Labour Relations Act and Basic Conditions of Employment Act essentially extended already existing legislation that was originally used to protect unionised, skilled and semi-skilled white workers in the 1920's to now protect mainly unionised skilled and semi-skilled black workers (Seekings 2007).

enabling a remarkable transformation in the macro-economic environment that has resulted in economic stability. Several critical factors have contributed to this encouraging outcome. Iraj Abedian provides insights into these crucial factors.

First, the structure of the economy was progressively diversified so that the majority of the revenue base of the country is no longer dominated by primary products or commodities. The tourism sector, for example, contributes as much if not more to the GDP these days as does mining (2008).

Second, modernisation of the government's fiscal institutions and operations has been brought about by institutional, financial and budgetary reforms, bringing improvement in areas of 'cash management, asset-liability management and the inter-institutional co-ordination of fiscal and monetary policies' (2008:5).

Third, there has been a rising credit-worthiness that has resulted in the steady decline of the cost of borrowing in both private and public sectors. This alone allows more money to be diverted from debt service into other areas or programmes and serves to attract investment into South Africa due to the growing economic stability (2008).

Fourth, there has been a substantial deepening of the local capital markets, something essential for financing long-term growth within the economy. 'Few

developed countries, and even fewer emerging economies, enjoy the same macro fiscal conditions that characterise contemporary South Africa' (2008:5).

This growing confidence in the economy has led to the gradual expansion of state expenditure on social and economic infrastructure. Significant increases in public spending were evident as early as the 2002 budget, funded in part from declining debt service costs, which in 2002 fell from 4.8 percent to 4.1 percent of GDP, freeing R10 billion for additional spending (McCord in Kraak 2008:3). During this period, a budgetary shift to social services expenditure accounted for 57.6 percent of the total budget in 2002/03. Most of this spending was channelled into the social-grants system, housing, and community development, with the social grant payment showing the most promise of success in achieving what it is designed to do.<sup>5</sup> Significantly less was spent on education and health, where real growth rates have been low (Kraak 2008).

### **3.2 Governmental policy and legislation**

However, in spite of quite remarkable real economic growth and increased social service spending resulting from such good policy initiatives, there have been some serious policy inadequacies and failures that have contributed to what has become a national crisis. This section considers five of these inadequacies and the resulting issues that remain difficult challenges for the general public.

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<sup>5</sup> The All Media and Products Survey [AMPS] has yielded results showing that real income for all race groups has increased, especially after 2002. The recent decline in poverty, according to this survey, is the result of a combination of faster economic growth, improving labour markets prospects and increased social spending. (van der Berg et al. 2007)

### 3.2.1 Industrial policy

One such policy failure has been the lack of a well-defined industrial strategy whereby whole sectors of the economy have been left without the broad-based planning necessary for the continued economic stability essential for growth. An example of this failure is that agriculture and its associated industries have received little attention, further highlighted by the process of a land-redistribution programme that has been poorly managed. A great deal of uncertainty in the farming sector has been caused by the land-redistribution issues not being meaningfully determined (Abedian 2008). There is no certainty in the agricultural industry as to where policy is headed or how land distribution issues will be resolved without detriment to agriculture as a whole. The uncertainty prevents individual stakeholders from being able to do the proper planning necessary to ensure their long-term viability.

### 3.2.2 Public works policy

Another failure, which is possibly the most damaging, was the neglect of medium- to long-range planning regarding economic public works infrastructure, as partially evidenced in the recent electricity crisis of late 2007 and the beginning of 2008. The need for investing in electricity-generating infrastructure was publicised in the 1999 White Paper on Energy Policy.<sup>6</sup> It expressed the disturbing forecast by Eskom,<sup>7</sup> the national electricity utility, that South Africa would run out of electricity by 2007. In response to this

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<sup>6</sup> National Nuclear Regulator Act [No. 47 of 1999].

<sup>7</sup> Eskom was established in 1923 as the *Electricity Supply Commission* (ESCOM) by the government of South Africa in terms of the Electricity Act (1922). It was also known by its Afrikaans name *Elektrisiteitsvoorsieningskommissie* (EVKOM). The two acronyms were combined in 1986 and the company is now known as Eskom.

information, the government placed a spending moratorium on the parastatal, prohibiting investment in additional electricity generation capacity and unwittingly precipitating the subsequent electricity crisis that resulted in the loss of billions of Rands to the economy, mainly within the industrial sector (Abedian 2008).

Another area neglected in public works planning was most notably the country's aging urban infrastructure, which suffers from decay in its utilities, weak financial management capability, and poor institutional performance. Part of the problem lies with municipal capacity itself:

23 percent of municipal chief financial officers had only grade 12 certificates, 64 percent of technical services managers had less than four years of experience, and 46 percent of municipal managers had been in their positions for less than one year. Additionally, the level of skills mismatch and vacancies in local municipalities was as high as 40 percent. The implications of such infrastructural deficiencies for local economic development, social welfare and economic competitiveness are considerable (Abedian 2008:8).

### **3.2.3 Labour market policy**

Labour market policy directly affects employment capacity. Inappropriate labour market policy can, in two major ways, inadvertently hinder the demand for unskilled labour which then impacts poverty figures and economic prosperity. First, industrial relations procedures inhibit employee dismissals by creating high costs for employers wishing to dismiss labour, regardless of the reason for dismissal.<sup>8</sup> Secondly, wage bargaining is negotiated in centralised fashion by

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<sup>8</sup> By one estimate, it costs business 1 percent of GDP to dismiss employees each year, and three times the number of work-days are lost through dismissal procedures rather than through work stoppages (Seekings 2007:24).

sector-based Bargaining Councils. Seekings (2007) suggests these Councils are dominated by large, capital-intensive employers, coupled with the trade unions, who share a common interest in setting high wages throughout the sector to eliminate competition from smaller, less capitalised and less organised firms. Although the government has recognized the need for labour market policy reform, such reform has been strongly opposed by the Congress of South African Trade Unions [COSATU] and the South African Communist Party [SACP], making such reform difficult to achieve.

### **3.2.4 Education policy**

The adoption of Outcomes Based Education [OBE], and, in particular, the revised Curriculum 2005, seemed to be a reasonable approach to take given the political imperatives facing curriculum developers in the mid-1990's. OBE clearly sent out strong signals that the dawn of democracy in South Africa had ushered in a new educational order. Edward Fiske and Helen Ladd noted that the 'authoritarian values and top-down pedagogical approaches of apartheid-era education were out—replaced by new values and teaching methods that emphasized democratic participation and the potential of every child to succeed' (2005:170).

However, complex curricular design coupled with the unrealistic expectation that teachers could develop their own teaching resources led to serious practical problems. Other issues surrounded curriculum implementation and the practical problems associated with having the necessary time and resources to actually train teachers to use this new approach to education. Despite country-

wide training programmes to try to bring educators into the process, fundamental challenges remain. Ramphela explains:

A lack of understanding of the subject matter and poor grasp of the teaching methods required have brought teaching and learning to a crisis point in poor school districts. Teachers in poor schools, who in most cases are under-qualified, cannot make the transition to this new curriculum despite numerous attempts at training.... There seems to be a hardline view that post-apartheid education has to be as radically different as possible to qualify as a legitimately transformed education (2008:177).

It appears that the core problems were rooted in policy decisions related to teaching resources. Fiske and Ladd point out that because OBE focuses on educational results, the reality of the OBE model is that these results are determined by the 'financial, human and other resources invested in the system, especially the quality of the teachers' (2005:171). Understandably then, OBE is designed to work best in schools with relatively small class sizes, well-trained teachers, and wide access to textbooks and other resources such as would be found in privileged schools in the South African context. Such schools are normally accustomed to group-work and instruction in critical-thinking and have libraries and adequate teaching materials that have been accumulated over a fairly long period of time.

OBE poses difficult, if not insurmountable, challenges for schools in low-income communities that lack access to substantial resources. Many teachers in these environments have unsophisticated skills in using resources such as textbooks when available. Fiske and Ladd believe that without a substantial investment in the human and physical resources required to implement the OBE curriculum, as well as the necessary time required to properly develop these resources, 'it



is difficult to envision how this new curricular approach could succeed in furthering the cause of equity in schooling' (2005:171).

Ramphele, moreover, states that high and overwhelming expectations are placed on the OBE learners with the 'outcomes-' or 'results-based' curriculum requiring extensive reading and writing in all subjects, critical thinking and strong conceptual skills, and an awareness of the world around them, especially the 'social, economic, moral and ethical issues facing their country ...' (2008:177). She strongly believes that with all that is required of OBE learners and educators, the unintended result is that it has made the education system even weaker (Ramphele 2008:177). This resulting weakness is discussed in some detail later in this chapter.

### **3.2.5 Health policy**

Any meaningful discussion about why South Africa is where it is regarding health care begins with HIV/AIDS, not simply as a health issue but as a developmental challenge. By its nature and the way it continues to impact populations over extended periods of time, the disease imposes socio-economic and political challenges on humanity. As Ramphele (2008) explains, the active stage of the disease imposes a tremendous burden upon the health care system by weakening the human resource base of the system; its nurses, doctors, and other health professionals. It likewise undermines the very fabric of society, because death from HIV/AIDS often hits economically-active people, (thereby) leaving '... families and communities without livelihoods and essential

knowledge (as) culture and wisdom is lost to Aids orphans left to fend for themselves' (Ramphela 2008:227).

When confronted by the pandemic both the apartheid-era National Party and the first democratically-elected ANC government failed to act. The first post-apartheid ANC government failed at a time when it was still possible for the scourge of HIV/AIDS to be contained, leaving an incalculable cost to the nation both in the increased financial outlays now needed to treat the victims and in the tremendous loss of life. The current health care system continues to reel under the weight of this failure by government to promptly act.

Much of the blame can be placed at the feet of former President Mbeki, who questioned the foundations of the science that formed the global approaches to prevention and treatment. His views<sup>9</sup> were shaped by 'dissident scientist's views he encountered on the internet ... hon(ing) in on the view that Aids [sic] was a disease of poverty ... (while) question(ing) the link between Aids [sic] and the sexually transmitted HIV' (Ramphela 2008:232).

The impact of Mbeki's views on the rest of South Africa was significant. His labelling of the science behind HIV/AIDS causality as being racist silenced many of the scientists and health professionals who feared being branded as bigots. Since the scientific community was predominantly white, many felt particularly vulnerable to being misunderstood during the delicate time of transition after apartheid (Ramphela 2008).

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<sup>9</sup> Mbeki strongly associated with dissident views in his public statements, 'challenging what he saw as racist motives behind the link between sex and HIV transmission' (Ramphela 2008:232).

In addition, Mbeki argued against providing antiretroviral [ARV] treatment to those infected with HIV, announcing that even if HIV caused AIDS, South Africa could not afford to provide treatment to all those that needed it, not even to mothers wanting to minimise transmission to their babies during birth or while breastfeeding (Nattrass 2004). Ironically, in a comparative study undertaken in Brazil, a country at a comparable level of socio-economic development, both public and private researchers showed that South Africa could not afford **not** to offer comprehensive treatment and care for all infected citizens (Ramphele 2008).

This information was corroborated in a study conducted by Nicoli Nattrass (2004:116) and her colleagues, indicating that in 2003 the estimated additional cost to the South African health care budget for providing comprehensive treatment, including ARV drugs, to be no more than R20 to R40 billion per year. Since in 2000 and 2003 the total health-care budget of R33 billion was already carrying the burden of HIV/AIDS-related illnesses, the additional cost was deemed affordable, especially because an estimated 60-70 percent of hospital admissions during that time of were linked to HIV/AIDS infections. Furthermore, if one factored in the opportunity costs of skills losses to the corporate environment and risks to the investment climate, providing treatment became even more cost effective (Nattrass 2004:116). As previously detailed in Chapter 2, the failure by government to act expediently and aggressively has been far more costly; South African statistics undeniably profile a pandemic totally out of control.

Fortunately, the deficient response of government to the national HIV/AIDS problem spurred others into action. In 2001, the Treatment Action Campaign [TAC] filed a successful action against the government in the Pretoria High Court, claiming that the failure to provide comprehensive treatment and care for people living with HIV/AIDS, 'constitute[d] a violation of their socio-economic rights.' Although the government appealed to the Constitutional Court, the case was withdrawn before it could be heard. In November 2003 the government finally rolled out a comprehensive anti-HIV/AIDS programme—'almost 10 years too late, but better late than never' (Ramphela 2008:240).

Additionally, in 2002 many companies such as Anglo American, BP, and Unilever responded from a purely financial perspective to their conviction of the genuine benefits of ARV treatment by providing comprehensive treatment and care for their respective employees. Ramphela (2008:237) explains that they rightly realised that the costs of not providing treatment far outweighed the cost of doing so, 'especially if absenteeism, additional medical costs, lower productivity and the cost of replacing trained and experienced workers' were to be factored in. Studies have shown that ARV treatment makes those infected less infectious by lowering the 'viral load,' meaning that there are concomitant benefits to society in general when adequate treatment is accessible to those infected with the HI-Virus (Ramphela 2008).

Unbelievably, on 26 September 2003, just a few months before the rollout of ARV treatment, Thabo Mbeki, in an interview at the Plaza Hotel prior to a United Nations (UN) meeting in New York, stated, 'Personally, I don't know

anybody who has died of AIDS.’ When asked whether he knew anyone living with HIV, he added quietly: ‘I really, honestly, don’t know.’ At the time of this statement, South Africa was losing 600 people per day from HIV/AIDS-related causes (Caelers 2003:3). Notwithstanding the irretrievably lost lives and time due to the persistent denial of appropriate measures for dealing with the disease by former President Thabo Mbeki and former Minister of Health, Manto Tshabalala-Msimang<sup>10</sup>, much has been accomplished since the start of the ARV-rollout.

Public policy and legislation have critical roles to play in the formulation or reformulation of the state. If policymakers accurately define the issues and implement the vision by making spending decisions toward desired outcomes, then policy and legislation can succeed in facilitating swift change for society.

But flawed policy can just as easily derail progress and create unwanted outcomes that require both years to undo and restorative spending to reverse direction, as witnessed in the evident shortcomings of OBE and the disastrous consequences caused by former President Mbeki’s dilatory response to the national HIV/AIDS pandemic. Public policy and legislation can greatly impact the future, both positively as seen in the financial policies that have brought about economic stability, and negatively as shown through the public works decisions that led to the electricity crisis, the implementation of OBE, and failure to adequately respond to the HIV/AIDS pandemic. Just as good policy

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<sup>10</sup> Tshabala-Msimang also shocked the world at the Toronto World HIV/AIDS Conference in 2006 when she focused the South African exhibit on her controversial alternative remedies: garlic, beetroot and African potatoes. Antiretrovirals were hastily added due to the shock expressed by delegates (Ramphela 2008).

decisions can enable the attainment of desired outcomes and bring prosperity, so bad policy decisions can leave a legacy that requires a reversal in the current process along with the commensurate discipline to head in a different, sometimes opposite direction. The HIV/AIDS policy changed slowly at the cost of many lives. Education decision-makers remain committed to a system that has little chance of adequately empowering South African young people to face the challenges required to prosper in a technologically advanced world. Unfortunately, the longer it takes to change or reverse course makes it more difficult to get where one needs to go.

### **3.3 Poor service delivery**

An apartheid 'rebound' process of over-compensation often exacerbates existing problems. The post-apartheid transformation process has been viewed by some as one of replacing the white men who dominated the roles of the public sector with black people. In many ways this myopic approach neglects the main objectives of transformation and perhaps inadvertently jeopardises the entire process. Overall, the key to improving social outcomes for the poor is to improve service delivery; such action depends upon good managerial efficiency and sound accountability structures. Since the ability to increase government expenditure is limited, it is critical that the efficiency of social delivery is improved. Servaas van der Berg et al. concur that a focus upon improving managerial skills and accountability structures 'is an attainable goal that requires careful attention but does not depend on massive financial resource inputs' (2007:41).

Ramphele intuitively and constructively outlines additional considerations to meet these enormous challenges. First, a transformed South Africa should be a country that 'is both more equitable and more prosperous, with the benefits of prosperity shared by all as envisaged by our national constitution' (2008:87). Those structures that have confined the oppressed majority must be eliminated and the prosperity previously afforded to only a small segment of the population should be made available for all.

Secondly, the process of transformation has to proceed 'within the realms of possibility' (Ramphele 2008:87). It is not possible to have desired equity in high skills employment areas when there has been no previous national investment in developing high skills among the majority of the population. Equity must develop over time as individual skills levels are developed to create a wider pool from which to draw.

Thirdly, as Ramphele contends, skills already developed even though they are inherited from the apartheid era, 'represent investments made by all taxpayers (willingly or unwillingly) and should be used to improve the delivery of essential public services and South Africa's competitiveness as an economy' (2008:88). One serious apartheid-generated challenge inherited by the new democracy is the doubtful quality of the human-capital base. The endemic heritage of poor education for the oppressed majority of the population that still lingers in the new South Africa manifests itself in the low skills levels across employment sectors, with the result that the current South African workforce in many instances is simply not capable of fulfilling the requirements associated with

running a dynamic, technologically-advanced society. Although racial redress is absolutely necessary, the failure to employ qualified people regardless of race undermines the capacity to deliver public services to all people, thus predominantly impacting the most vulnerable who can least afford it.

### **3.3.1 Skills shortage**

Ignoring these taxpayer-purchased skills that lie predominantly in the white population has led to quite bizarre behaviour with tremendous societal consequences. Examples have been found in the public health sector in some provinces where a 'racial quota' for certain specialist jobs is in effect, leading to the unfortunate situation that South Africa continues to suffer desperate skills shortages while young, white South Africans, unable to work in the fields for which they have been trained, are forced to emigrate to find employment. Meanwhile, those same positions here remain vacant. 'Such practices amount to a denial of the rights of white people as citizens--a situation no different from the very racism we are trying to consign to the dustbin of history' (Ramphela 2008:86).

Post-apartheid South Africa, therefore, has been inflicting severe injury upon itself in two clear, albeit unintentional, ways. First, by racially restricting employment positions it is losing to emigration critically essential skills, especially in engineering, medicine, and the humanities. Secondly, it is discarding a significant investment made by taxpayers over a number of years in educating these white young people. 'We behave like a person who is limping from an injured foot who then shoots himself in the other foot to even



the score' (Ramphela 2008:86). Consequently, society as a whole is adversely affected when essential service delivery is impeded.

Shortage of essential skills has similarly affected the ability of the nation to manage public utilities and deliver services, resulting in a real crisis throughout the country. The severity of the crisis is detailed in a 2005 study by the South African Institute of Civil Engineers [SAICE]:

(O)f the 231 local municipalities, 79 had no civil engineers, technologists, or technicians. Of the 47 district municipalities, four had no civil engineers, technologists or technicians. In addition, those municipalities that had civil engineering staff reported 35% vacancies and the freezing of many posts owing to budget constraints. Provincial government structures also have acute shortages of skilled staff, with some positions reported to have been vacant for seven or more years (Lawless 2005:5).

Civil engineering infrastructure is inextricably linked with the social and economic health of a nation. South Africa has an enormous disadvantage in comparison to almost all but the least-developed nations. *Table 3.1* on the following page identifies the number of people per engineer and per medical doctor for the given nations. With the exception of China and South Africa, the number of people per engineer is of the same order as the number of people per medical doctor.

*Table 3.1 Comparative ratios of people to professionals*

<b>Country</b>	<b>Number of people per engineer</b>	<b>Number of people per medical doctor</b>
Australia	455	414
China	130	593
Germany	217	291
South Africa	3166	1493
UK	311	492
USA	389	361

(SAICE 2006:5)

Western Europe, North America, India and China have between 130 and 450 people per engineer, whereas in South Africa there is only one for every 3200 people, a ten to twenty-fold disadvantage (SAICE 2006:5).

But even finding qualified graduates in various fields does not necessarily translate into their availability for public-sector jobs. It takes time to develop from graduate to specialist in a given field and proper development happens as professionals are mentored by experienced guides. The lack of enough skilled specialists to properly cover the existing professional needs means that everyone functions at a capacity that prohibits proper maturation. This leaves the overall public service sector short-changed with too much ground to cover by too few technicians with the ability to do the job properly.

There have been efforts at capacity building to solve this type of problem, but it is not possible to effectively build the competency of people who already lack the basic requirements of numeracy and literacy for the positions they hold. However, endeavours have been made to provide technical support for local

managers; Project Consolidate, a programme sponsored by the national government is one such example. But its effectiveness will depend upon the integrity of decision-makers to curtail practices that undermine the ‘recruitment, retention and promotion of competent managers in local authority structures’ (Ramphela 2008:84). It is critical for service-delivery effectiveness that competent leadership structures are retained and supported, thereby making good on the promise of freedom for ordinary citizens, for as Ramphela succinctly puts it, ‘[f]reedom for poor people is access to quality education, health care and decent housing’ (2008:87).

### **3.3.2 Mismanagement**

Reports from the office of the South African Auditor General between 1996 and 2006 on the performance of the management of the public sector indicated a severe crisis. One example is telling: in the 2005/2006 audit process only 2% of local authorities had unqualified audits (Ramphela 2008:84). Others allegedly lie about their qualifications in order to qualify for jobs and receive the attached income and benefits, putting the institutions in which they work at risk. ‘It is amazing how tolerant the post-apartheid government at all levels—local, provincial and national—has been of this fraudulent behaviour in the public sector’ (Ramphela 2008:84).

Criminal behaviour, especially crimes committed by those empowered to lead communities by safeguarding the rights of citizens through government, puts society at tremendous risk. The front page story in a leading national weekend newspaper in June 2009 detailed an investigation by the Auditor General

Terence Nombembe into more than 2,000 government officials who were involved in tender-rigging and corruption worth more than R610 million (Ngobeni 2009:1). The government officials allegedly awarded tenders to companies owned by themselves, their spouses, or their relatives, painting a 'bleak picture of an administration in shambles where corruption, misspending and flagrant abuse of public money is the order of the day' (Ngobeni 2009:1). Tenders were split by these officials so they would remain below the R30,000 legal limit that requires competitive bidding. Additionally, there were cases where contracts were awarded to government employees who 'had not scored the highest points during the evaluation process, without providing reasonable and justifiable grounds for doing so' (Ngobeni 2009:2). Derek Luyt, head of media and advocacy at the Public Service Accountability Monitor, was also quoted in the same article stating that, 'what we have here is not simply poor management, but a telling failure of political oversight, believing that the report is the "tip of the iceberg" of corrupt employee-private entity relationships' (Ngobeni 2009:1).

The actions of corrupt government officials have direct consequences upon citizens. First, critical government revenues are funnelled into either inappropriate or useless projects for the main purpose of providing financial benefit to a government official or his/her family or friends. Every Rand misspent further slows or derails the transformation process needed on many fronts. Secondly, the failure to support legitimate businesses in the bidding process erodes the very structure that the country relies upon to provide the employment and tax revenues that could benefit South Africa as a whole.

Unnecessary suffering results when those hired as trustees for the benefit of the public violate that trust and work instead for illegal personal or nepotistic gain.

But not all mismanagement is criminal in origin or intent. Multitudes of black and white south Africans have not had any experience in running a 'modern, non-racial democracy on their home ground' (Ramphela 2008:15). Much of the decision making going on is happening without the experience or capability to handle it properly. There is much to learn in running a democracy for a country and people without much experience in it and, unfortunately, what must be learned must be learned quickly.

### **3.3.3 Educational incapacity**

In 1953 the South African Minister of Native Affairs, Hendrik Verwoerd, made the case to Parliament for legislation restricting the quality of schools serving black Africans, declaring:

Racial relations cannot improve if the wrong type of education is given to Natives ... They cannot improve if the result of Native education is the creation of frustrated people who, as a result of the education they received, have expectations in life which circumstances in South Africa do not allow to be fulfilled immediately (Fiske & Ladd 2005:1).

The Afrikaner-dominated parliament accepted Verwoerd's arguments and approved the Bantu Education Act of 1953 which asserted government control of church-run schools and forbade African teachers from criticising the government or school authorities (Fiske & Ladd 2005). It would be difficult to find a clearer commitment to education for servitude (Ramphela 2008).

Promulgation of the Bantu Education Act No 47 of 1953 produced profound and devastating impediments to the ‘capacity of the majority population to free themselves from the shackles of the apartheid past’ (Ramphela 2008:171). Education was mandated to be ‘inferior’ for African children so as to restrict them to certain forms of labour. Since education forms the basis for how people construct and relate to the world around them, if one is poorly educated there is a diminished chance at self-sufficiency. After unemployment, Seekings cites education as the, ‘second immediate cause of income poverty and inequality’ (2007:18), adding that high inequality in income distribution throughout South Africa can be explained ‘in terms of differential rates of return to education and unequal grade attainment’ (Seekings 2007:18).<sup>11</sup>

Sustainable development is hampered by capacity constraints that pose major challenges to the education system. The transformation process is severely hampered by weak capacity in all of the key elements necessary for success: the state, the teaching profession, the governing-body system and in parents that should be holding the system accountable for providing a high-quality education for their children (Ramphela 2008).

Section 29(1)(a) of the Constitution of South Africa states that ‘everyone has a right to basic education, including adult basic education’ (Constitution No. 102 of 1996). This right has become a compulsory school-attendance policy for children from 7-15 years of age [or until the end of Grade 9], hence placing the responsibility on government to ensure that schools are accessible and

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<sup>11</sup> It is quite unclear the skills that are associated with any particular level of grade attainment, including even matric (Seekings 2007).

affordable for children between these ages. Since government has charged the national Department of Education [DET] with this mandate, the Department is responsible for ‘for ensuring that within every school children can learn and teachers can, and do, teach’ (Pendlebury 2008:24).

The pertinent question that needs to be asked is this: in the current system, are South African children learning from teachers that are not only competent to teach, but who effectively fulfil their teaching mandate? The answer to that question requires use of the term ‘access,’ which is used in one of two ways: institutional access and meaningful access.

Shirley Pendlebury says that analysis of the General Household Survey data shows that 96.5 percent of children aged 7-17 years attended some form of educational facility in 2007 (2008:25). This is ‘institutional access.’ But institutional access is only half of the ‘access’ equation. While at school, children must also have ‘meaningful access,’ which implies that ‘education happens’—teachers teach and children learn from ‘carefully designed learning programmes and materials that enable children gradually to develop competencies ...’ such as ‘learning to read and write, to reason, to work with number, shape and pattern, and to use concepts to understand the content of different learning areas’ (Pendlebury 2008:25). Children are considered to have ‘meaningful access’ to education when learning happens. But as Pendlebury points out, children’s prospects often depend largely upon race, poverty, gender, geography and disability (2008).

A closer look at ‘meaningful access’ in South African schools shows how Verwoerd’s legacy still impacts upon learners today in the quality of the instruction that they receive at school, especially in the subjects of mathematics and science. Due to their own poor education, most South African teachers have deficient knowledge resources. Nick Taylor (2006), a respected educational researcher and executive director of the Joint Educational Trust Services [JETS], writes that a sample of Grade 3 teachers was asked how they would teach certain items taken from the mathematics and literacy tests administered to Grade 6 pupils. In discussion with the teachers it was established that they struggled to provide the correct answers—the teacher’s mean score was 55 percent on the literacy items and 65 percent on the mathematics items (Taylor 2006:72). Since the exercise contained items from the tests for Grade 6 pupils, it is disturbing to note the very low English literacy marks of the language teachers: ‘12 of the 23 who took the test scored less than 50 percent, with a lowest score of 21.7 percent. Only one teacher scored higher than 75 percent’ (Taylor 2006:72). Since an assumed prerequisite for teaching any subject is a good knowledge base of the subject matter, it is obvious that urgent attention must be given to improving this.

A 2005 study conducted by the Human Sciences Research Council [HSRC] found that on average teachers spend 3,2 hours per week teaching, ‘with many hours spent on activities such as ‘continuous assessment’ (Ramphela 2008:179). Results of the annual Senior Certificate examination show that almost 80 percent of the total 6118 secondary schools are essentially dysfunctional, ‘providing education of such poor quality that they constitute a



very significant obstacle to social and economic development, while denying the majority of poor children full citizenship' (Taylor 2006:73).

It is unreasonable to expect learners to be proficient in their studies if teachers are not qualified to teach. The consequences of the intentional under-development of human capital over generations are bearing expected outcomes (Ramphele 2008).

Other results continue to paint the same bleak picture. In the 2003 Third International Mathematics and Science Study in which the HSRC tested 9000 grade 8 learners for maths and science proficiency, South Africa came in last out of 50 countries. The learner test scores showed the widest distribution of all countries, mostly along racial lines (Ramphele 2008:174).

Due to the unacknowledged capacity issues in society that have lingered beyond 1994, there have been unintended policy consequences in the transformation of the school system. The playing field is not level for schools that came out of apartheid under serious inequality and, although intentions have been good, there is a need for measured reform that does not overburden the system during a phase of intense focus upon building capacity. Educational reformers have not paid enough attention to 'undoing the legacy of cognitive under-development by the apartheid system' (Ramphele 2008:176).

There is a close corollary between education and unemployment. Generally, lower levels of education are associated with greater unemployment. Between

32 percent and 37 percent of those with incomplete primary, complete primary and incomplete secondary education are unemployed, while 21.3 percent of matriculants fall into this category.

Poor quality education and learner performance is indicated by: lower than expected achievement levels in international learning tests (given South Africa's level of development and socio-economic status); low learner achievement levels in literacy and numeracy as measured by Grade 3 and 6 systemic evaluation results; inadequate number of learners passing higher grade mathematics and science in order to enter tertiary education; minimal increases in Senior Certificate exemption rates; significant number of learners exiting school between grades 10 and 12 as well as high repetition rates in these grades; high drop-out rates at tertiary education institutions and poor prospects of finding employment amongst the youth (PERO 2008:117).

Although the bulk of the population has already left school, the levels of acquired education and skills of new entrants into the job market are important in shaping the ways that inequalities develop over time. A poorly educated workforce has a direct bearing upon the economy as businesses fiercely compete for people with higher skills in contrast to the vast majority of the eligible labour force with only basic or nonexistent skills. Skills-related gaps exist throughout all sectors, with the education sector under serious pressure. In spite of a substantial rise (about 7 percent) in GDP expenditure on public education after 1994, a very low quality of education is provided by most South African schools (Seekings 2007:19). But again, input of fiscal resources does not necessarily guarantee the desired social outcomes (van der Berg 2005).<sup>12</sup> While among formerly black schools there is great variation in the quality of education delivered, many black learners now attend formerly 'whites only'

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<sup>12</sup> Fiscal resources do not necessarily translate into the scarce real resources (qualified teachers, administrators, etc.) required to improve social delivery. Nor does increased funding for public schools necessarily convert into attracting well-qualified teachers into township or rural locations. Secondly, available resources are not always effectively utilised (van der Berg et al. 2007:38).

schools. Unfortunately, South African schools generally perform at an even lower level than most of their African counterparts, 'despite greater South African resources, less acute poverty and (a) more educated parent population' (van der Berg 2005:854).

International testing has shown that extensive intervention is required at a much earlier stage than matric. Promotion to higher grades appears to be relatively easy, thus educational attainment (years of education completed) may not accurately indicate the cognitive level of the student. Taylor, Muller, and Vinjevold point out that:

[s]tudies conducted in South Africa from 1998 to 2002 suggest that learners' scores are far below what is expected at all levels of the schooling system, both in relation to other countries (including other developing countries) and in relation to the expectations of the South African curriculum (Taylor et al. 2003:41).

Other studies quantify poor educational performance. Post-transition performance in numbers of learners achieving matriculation passes and university endorsements is cause for great concern. Even with increased resources being channelled to historically 'blacks only' schools, the school system output barely keeps pace with population growth. Paradoxically, weak matriculation results are particularly severe in the poorest provinces, which have benefited the most from funding shifts (van der Berg 2005).

Improving black education is a crucial step for reducing the racial-earnings gap. There is now almost universal access to education and racial gaps in the number of years of education completed have also been substantially reduced.

Presently however, the biggest cause for concern lies in the severe lack in the quality of education in many schools:

This exceedingly poor performance in the bulk of the school system severely restricts equity of educational outcomes and ultimately equity in the labour market. It also limits the economy's ability to sustain high levels of technologically driven economic growth (van der Berg et al. 2007:37).

There is only a limited impact that can be made by additional resource outlays or resource shifts in redressing this shortfall. Robust economic growth may reduce poverty and racial inequality in coming decades, but it is critical that improvement in the quality of education becomes an unyielding priority. This will not happen as a result of increased spending alone, but must take place inside a measured overhaul of the educational processes in poorly functioning schools (van der Berg 2005).

### **3.3.4 Health services delivery**

Attempts to improve health services to the general public have focused upon improving accessibility. And while government outlays for health care have been significant, 'international evidence indicates that government health spending has a limited impact on health outcomes' (van der Berg et al. 2007:35). Often this is because of the gap between spending and delivery. Health services are often not the major factor determining outcomes and conditions because '(c)lean water, sanitation, personal hygiene and education may play an even larger role' (van der Berg et al. 2007:35).

Despite increased government spending in the public health system, consumers ‘show overwhelming preference for private health care where it is available and affordable’ (van der Berg et al. 2007:36). In economic terms, public health care is ‘an inferior good—as an individual’s income increases, there is a shift away from using public health services in relative terms’ (van der Berg et al. 2007:36). It is not difficult to identify the reasons for this: users of public health facilities ‘often complain of rude staff, long waiting times and medicines not being available, and regard these problems as being serious enough for a considerable share of the very poorest families to prefer to pay for private health care rather than visit a free public health facility’ (Burger & van der Berg 2008:84). Other complaints include dirty facilities, incompetent staff and incorrectly diagnosed ailments. There were no similar complaints about private health care (Swanepoel & Stuart 2006).<sup>13</sup>

Poor service delivery can be traced to numerous causes, all presenting challenges difficult to overcome. Skills shortages throughout critical industries and institutions have left gaps which require intentional, focused capacity building that will require sufficient time to properly develop human resources.

Unintentional mismanagement is difficult to address until skills development reaches into the positions of leadership, but corruption must not be tolerated or the framework for transformation disintegrates. Governmental efforts must

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<sup>13</sup> Palmer (1999) identified why even the poor prefer private health services and often avoid public services. Two of the main reasons were derived from focus group discussions in rural towns: respondents felt that paying for services meant that there was an incentive for good service delivery, and that the public sector did not provide effective care. (van der Berg et al. 2007:36).

effectively address social issues by spending government resources for the public good, not in nepotistic personal enrichment.

Nearly five decades of apartheid's intentional under-development of education and workforce skills cannot be overcome in a few years. Instead, skills shortages must be engaged with the determination to develop the population to the extent that it becomes sufficient to address the shortfalls that currently exist. These efforts must begin with teachers, those responsible for developing the coming generations. There is little hope in turning around the skills shortage crisis unless the underdeveloped majority of the population is equipped to fill the gaps, a somewhat daunting proposition.

## **4 Conclusion**

To gain a proper understanding of any problem it is useful to familiarise oneself with the processes that have led to the current state of things—why things are the way they are. It is not only knowing what is happening, but also understanding what has brought about the current status, thereby bringing the context necessary for change if change is necessary.

Apartheid remains responsible for many of the difficulties facing the nation, forming the psyche of the South African population that continues to hold society in the ways of the past. Structures put in place during apartheid, although now physically dismantled, continue to influence the way policies

develop, with terms like 'racism' and 'quotas' functioning as a backdrop to much discussion and policy formulation.

Policies that sought to redress the previous wrongs have done so with limited success. Recent financial management has brought stability to the South African economy and has strengthened international ties by doing so. But other strategies attempt to escape from the past without rightly providing for the future, necessary steps that are critical for dealing with the inequalities that have developed. The existence of broad areas of severe mismanagement has been detrimental to the country. One example of this is the public works policies that have been incredibly short-sighted, leaving the financial stability of the economy in peril by the failure to adequately plan for the nation's power needs. Industrial development and economic growth were severely hampered during the crisis that developed in 2007/2008 as a direct result of this policy failure.

Education policy has been what could be construed as a just reaction against apartheid, but the replacement of the previous educational system with an 'outcomes-based' or OBE model has been unfortunate. The dramatic shift into the latter process without due consideration of the tremendous challenges that make such a model impossible to properly implement due to teacher incapacity issues has jeopardised the entire educational process. There is no effective learning or 'meaningful access' taking place for the majority of the school-age population. The result is that the nation is becoming less-educated, thereby

leaving the workforce with serious skill shortages that will continue to hamper future development.

Appropriate HIV/AIDS policy was frustrated by ineffective leadership that remained blind to the ravages of the disease and failed to properly deal with the pandemic, leaving South Africa with the most HIV infected population by number in the world. There were adequate financial resources to deal with the disease, but no real political will to decisively act. That failure to respond to the rapidly growing crisis by former President Mbeki and his administration has put in great peril those infected and affected by the ravages of this disease. The opportunity lost has been significant.

Finally, poor service delivery continues to plague the nation on many fronts, much of it relating to skill shortages across critical delivery areas, especially in the fields of medicine and education. There are simply not enough skilled individuals for the positions available, meaning that service delivery across many sectors is severely impacted. Unfortunately, the inability to bridge the shortage means that issues of service delivery will be long-term since there is no apparent concerted effort to reverse the current shortfalls. It is essential that those in positions of authority begin to focus upon the arduous process of addressing sector shortages with the view of bringing change for upcoming generations of South Africans. Without such vision, there is little hope of reversing the service delivery issues that are currently gripping South African society.



## CHAPTER 4

### WHAT SHOULD BE HAPPENING?

To hold to a doctrine or an opinion with the intellect alone is not to believe it. A man's real belief is that which he lives by (George McDonald from Elmer 2006:21).

#### 1 Introduction

Although problems such as injustice, inequity and poverty are often observable and seem fairly obvious, what is not as readily discernable is how these problems should be resolved and who bears the responsibility for their resolution. The overwhelming scale of need is a daunting challenge for anyone to deal with, so it is easy to leave it exclusively in the hands of government to provide solutions. The title of this chapter asks a pertinent question that needs honest consideration.

Accordingly, this chapter ascertains the inherent obligations and responsibilities society bears toward those in poverty. The appropriate role-players who ought to be involved in assisting those who are unable to provide for themselves need to be identified.

The Bible helps to some extent in the identification of such persons. This chapter explores the biblical perspective on poverty and its alleviation, especially as it details God's expectations for his follower's behaviour toward

those trapped in poverty in virtually every society. This in-depth exploration begins by looking at words used in the Hebrew Scriptures to speak about ‘the poor’ and the requirements placed upon the nation of Israel detailing provision for ‘the poor’ and those found in poverty-stricken environments. The teachings of Jesus and other New Testament references to ‘the poor’ are then reviewed. The early church offers a model for the dignified alleviation of poverty that is challenging to examine both in its scope and its impact upon the 1st century world.

Lastly, the chapter reviews some recent theological responses to ‘the poor’ from the movements that have developed, seeking to find appropriate praxis in light of a proper understanding of Scripture. It queries the church’s role in dealing with the problem of poverty for those both inside and outside its walls and examines whether or not clear teaching guides behaviour.

## **2 Constitutional Perspective On Poverty**

The South African Government has been given a mandate for poverty alleviation. The Constitution of the Republic of South Africa (Constitution Act 108 of 1996) is considered one of the most progressive Constitutions in the world, going so far as to ensure that its citizens are afforded rights that would serve to eliminate poverty in its population. Accordingly, all South Africans have ‘the right to have access to adequate housing’ (26:1), requiring that the state take ‘reasonable legislative and other measures within its available resources to

achieve the progressive realisation of this right' (26:2). Everyone also has the right to have access to:

- health care services, including reproductive health care;
- sufficient food and water; and
- social security including, if they are unable to support themselves and their dependents, appropriate social assistance (Constitution Act 108 of 1996).

Based on the Constitution, it is generally understood that all South African citizens are entitled to the basic human rights of access to the housing, food, healthcare and financial support necessary to provide for one's physical needs. The reality thus far is that these lofty and desirable rights, although well-intentioned, remain elusive to the majority of South Africans, making the ambitious promises echoed by the Constitution to seem quite hollow. The fact that government is yet to make much successful headway in attaining these goals makes it highly unlikely that it will be able to accomplish them in the future.

### **3 A Biblical Perspective On Poverty**

It is necessary then to find other options in dealing with poverty if there is to be any hope of making sustained forward progress. Although there is a role that government can and should play, it has not shown itself capable of solving the complex issues surrounding poverty. Although this section details more specifically the biblical approach toward the alleviation of poverty, historically

there seems always to have been an understanding that care for the poor was the general obligation of humanity. Records indicate that ancient society at large cared for the poor in the world long before Israel appeared in the biblical record.<sup>1</sup> Charles Dickson points out that the 'matter of fact way in which the ancient Near East, before there was a Bible, already demanded the same treatment of the poor as does [Scripture] shows us that we have here an issue of simple humanity' that requires care for the poor as our co-members of the human race (1993:33). Existing ancient literature indicates that there was a general understanding of the need to take care of the poor in society, leading one to the general conclusion that the concept of society having responsibility for the poor is rooted in the fact that 'people share a common humanity' (Dickson 1993:33).

Poverty is far more than an economic problem. The way it is addressed or fails to be addressed is at the heart of what it means to be in 'moral community.' There is a deeply felt 'right to subsistence' that was 'legitimised by an older moral economy which taught the immorality of any unfair method of forcing up the price of provisions by profiteering upon the necessities of the people' (Natrass 2004:14). James Scott, in his classic analysis of the 'moral economy of the peasant,' argued that the deeply felt 'right to basic subsistence characterised not only European working class struggles, but also peasant protest and resistance in South Asia, China, Latin America and Russia' (1976:176-7). He writes:

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<sup>1</sup> One example from the Akkadian wisdom tradition prior to the writing of the Hebrew Scriptures is as follows: 'Show friendship to the weak. Do not abuse those who have fallen low. For the god who protects a human being is angered by such a thing' (Lohfink 1989:22 in Dickson 1993:33).

The operating assumption of the 'right to subsistence' is that all members of community have a presumptive right to a living so far as local resources will allow. This subsistence claim is morally based on the common notion of a hierarchy of human needs, with the means for physical survival naturally taking priority over all other claims to village wealth. In a purely logical sense, it is difficult to imagine how any disparities in wealth and resources can be legitimated unless the right to subsistence is given priority. This right is surely the minimal claim that an individual makes on his society and is perhaps the reason that it has such moral force (Scott 1976:177).

Pre-industrial forms of subsistence have changed so that the state has emerged in liberal democracies as the regulator of market relationships and a source of relief for the poor and indigent. However, when the state is not or cannot sufficiently provide, there remains the presumptive moral claim that all community members 'have a right to a living.' This common notion can alert society that something must be done simply due to a moral obligation toward fellow citizens. There is a common responsibility recognised, at least in principle, for one another as common members of the human race. Society as a whole is negatively impacted if portions of it are unable to adequately provide for one's basic needs required for living.

As detailed in Chapter 2, large portions of the South African population are living below the poverty line, unable to provide the basic necessities for survival. Despite extreme poverty being a fact of life for millions of South Africans, it seems that the general moral duty that society bears for poverty alleviation within its borders has failed to capture the attention of the more prosperous general population or to seriously address these incumbent responsibilities. When society and the state powers default on their duties in this regard, the earnest question arises as to where alternative responsibility may

lie. Maybe society no longer feels any obligation for other ‘common members of the human race?’ Regardless of who may be responsible for the failure, identification of appropriate and effective individuals, institutions and organisations who are both willing and able to rise to the challenge of effecting lasting change in impoverished communities is urgently required if the blight of poverty is to be confronted.

### **3.1 Foundational perspective for response to ‘the poor’**

Beyond a generally accepted role that society should engage in poverty alleviation, creation itself alludes to the necessity of a biblical response toward the poor.

Then God said, ‘Let us make man in our image, after our likeness. And let them have dominion over the fish of the sea and over the birds of the heavens and over the livestock and over all the earth and over every creeping thing that creeps on the earth.’ So God created man in his own image, in the image of God he created him; male and female he created them (Genesis 1:26-27).

Gaebelein and Sider (in Howitt & Morphew [s.a.]:49), believe that God’s making of mankind in His image is one of the greatest things ever said about humanity, even though this image is marred by ‘the Fall.’ Consideration of human beings in this manner emphasises the fact that a human’s dignity and value springs from God’s image and nothing else. CS Lewis captured this powerfully in one of his sermons:

The dullest and most uninteresting person you talk to may one day be a creature which, if you saw it now, you would be strongly tempted to worship, or else a horror and a corruption such as you now meet, if at all, only in a nightmare ... You have never talked to a mere mortal ... realize that it is immortals that we joke with, work with, marry, snub, and exploit—immortal horrors or everlasting splendours. (1949:15)

Human beings are the 'image bearers' of God and, therefore, inherently deserve respect and dignity. This puts all people on equal footing regardless of any other characteristics relating to financial prosperity, status or power. Those in poverty are no less the 'image bearers' of God than are those who are prosperous.

As bearers of the image of God, no one is insignificant and no one is worthless. Life has meaning and importance because God's imprint is upon our humanity. In view of this fact, Duane Elmer states, 'we must see others as God sees them, treat them as he would and name them as he names them' (2006:63). Therefore, on the basis of this intrinsic value, all people should be treated with the respect and dignity that God has given them; God's image is profaned when people are either mistreated or considered less valuable. 'One cannot honor God and at the same time treat another person in a manipulative, dehumanizing, disrespectful way' (Elmer 2006:63).

### **3.2 'Poor' defined in Scripture**

This general level of prescribed treatment toward people based upon the inherent value of all people as human beings carries through to the way that any disenfranchised people should be treated. In addition to the historical recognition of the need to take care of the impoverished, more exacting obligations prescribed in Scripture provide the biblical mandate for concerted care for the poor of society. This section begins with a discussion of the various words used for 'the poor' and their meanings as defined in the biblical text.

### 3.2.1 Evidence of ‘the poor’ in the Old Testament [OT]

#### *i ‘anî*

The most common word used for ‘the poor’ in the Old Testament is ‘*anî*, which means *poor, weak, afflicted or humble*. The ‘*anî* is primarily a person suffering some kind of disability or distress (Harris, Archer & Waltke TWOT I:683). It occurs 92 times in the Old Testament and is likely to be the underlying word for *pto·chos* in the New Testament (Kittel, Friedrich & Bromiley TDNT VI:888). ‘*Anî* is most likely derived from the root *nh* which means to be *bent, bowed down or afflicted*, denoting a person *wrongfully impoverished or dispossessed* (Kittel et al. TDNT VI:888). The term is not used for deserved poverty, which gives an understanding as to why God is presented as the protector of the poor. Rather, it implies a person who has been dehumanised, oppressed or reduced to some form of diminished capacity.

Israel is told not to oppress the hired servant by withholding the wages due him because he is ‘*anî*. Furthermore, if he is oppressed he may call upon God for help. Financially, the ‘*anî* lives a meagre day-to-day existence and is socially defenceless, often being the subject of oppression. Consequently, this word is often used with another word for poor, ‘*ebaywn*, that expresses the difficulties accompanying a lack of material possessions.

The people are commanded to give alms to the ‘*anî* by God (Deuteronomy 15:11). God instructs his people to grant loans to the ‘*anî* of Israel even when they have only their outer garment as collateral or pledge. They are not to further afflict them by keeping that garment overnight because the ‘*anî* would



need it to keep warm (Exodus 22:25-26), for it was his only outer garment. In Leviticus 19:10 the *'anî* is classed with the stranger as having a right to the gleanings of the field. *'Anî* is distinguished from *dal* (the poor) in Proverbs 22:22, 'Rob not the poor (*dal*) for he is poor (*dal*), neither oppress the afflicted (*'anî*) in the gate.' God is set forth as the protector and deliverer of the afflicted and he expects his people to be and do the same. So the ones who comply are deemed to be godly (Ezekiel 18:17), while those who do not as ungodly (Job 24:9; Proverbs 14:21; Isaiah 58:7) (Harris et al. TWOT 1:683).

Material deprivation and the resulting difficulties are closely associated with social oppression. Such affliction is clearly in mind in Isaiah 3:14 and Ezekiel 18:17. So God instructs his people to deal justly with the *'anî* (Isaiah 10:2), with the king being especially charged with overseeing their rights forever (Psalm 82:3).

Often physical affliction relates closely with spiritual affliction as in Psalm 22:24, resulting in a cry to God for help (Psalm 5:16; 34:6; 69:29). God's people are often described as afflicted (Psalm 68:10), but he does not forget them (Psalm 9:18; 74:19), he has pity on them (Isaiah 49:13), saves them (Psalm 34:6), delivers them (Psalm 35:10) and bestows favour upon them (Psalm 72:2, 4) (Harris et al. TWOT 1:683).

Lastly, *'anî* is used in the sense of *humble or lowly*. It describes the Messiah in Zechariah 9:9 and is in contrast to the scoffers (Proverbs 3:34) and the haughty (Psalm 18:27; 2 Samuel 22:28). Such a one has a contrite spirit (Isaiah 66:2),

trusts God (Psalm 14:6) and is assured of deliverance (2 Samuel 22:28) (Harris et al. TWOT 1:684).

## *ii an·aw*

Closely related to *anî* is the word *an·aw*, meaning *humble or meek*. It stresses the resulting moral and spiritual condition of the godly that results from being *anî* and expresses the intended outcome: humility (Harris et al. TWOT 1:682). Moses describes himself in this way, not in a boasting manner but simply as a report of his being in absolute dependence upon God. Throughout the rest of Hebrew Scripture such an attitude and position is most desirable. This is the result which God intended when he allowed affliction to come upon his people, that they would become humble.

The *an·aw* experience God as their deliverer (Psalms 10:17; 76:9) and receive grace from him (Proverbs 3:34). They rejoice to see God praised, seek him (Psalm 69:32) and keep his ordinances (Zephaniah 2:3). The humble and meek wait upon God, are guided by him (Psalm 25:9), and as such are commended as being better than the proud (Proverbs 16:19). They are contrasted with the wicked and the scoffers (Proverbs 3:34). The prophet states in Isaiah 61:1 that it is to such that the anointed of the Lord is sent to preach the good news of salvation. This group of people are conscious of God's approval and are confident that in the end God will save them (Harris et al. TWOT 1:683).

### iii *'ebəywn*

Closely associated with *'anî* and *an-aw* is *'ebəywn*, that is, *one in a state of wanting, a needy or poor person*. Its etymology is uncertain (Botterweck & Ringren TDOT 1:27). The word occurs 61 times in the Old Testament and generally connotes 'poor in a material sense' (Harris et al. TWOT 1:4). It appears often in combination with *'anî* (*'anî ve' 'ebəywn*), meaning 'poor and needy' (Deuteronomy 24:14; Jeremiah 22:16; Ezekiel 16:29) (Botterweck & Ringren TDOT 1:29).

The *'ebəywn* were on the lowest rung of the social ladder and included the unemployed landless labourers—artisans and beggars, slaves (they had been indebted and could not afford to repay their debts)—any who possessed nothing and had to get by through beggary or through relief afforded by a socially aware community system (Leviticus 19:9; 23:22). In the prophetic texts they were characterised by physical insecurity and homelessness (Isaiah 14:30; 25:4; Amos 8:4), hunger and thirst (Isaiah 32:6-7; 41:7; Ezekiel 16:49), exploitation by the rulers of society and other evildoers (Isaiah 29:19; Jeremiah 2:34; 20:13; Ezekiel 18:12; 22:29; Amos 4:1), unjust handling of legal issues (Isaiah 32:7; Jeremiah 5:28; 22:16; Amos 5:12), and economic manipulation (Amos 2:6; 8:6). The Psalms portray them as those who were robbed (Psalm 35:10), those who suffer (Psalm 107:41) and those who are victims of the swords and bows of the wicked (Psalm 37:14). The Wisdom texts speak out about there being some who 'devour the poor' (Proverbs 30:14). In Job they are portrayed as victims either of economic injustice (Job 24:4) or murder (Job 24:14). In Esther (9:22), they are the recipients of alms. Quinton Howitt

and Derek Morpew [s.a.] concur that this certainly was a group who were landless and living on the fringes of society.

#### *iv dal*

Another common word used for 'poor' in the Old Testament is *dal*, meaning *one who is low* from the root *dl* which means *to languish, to be weak, to be little*. It occurs 48 times in Hebrew Scripture and is often used as a parallel to *'anî* (Amos 4:1; 8:6; Isaiah 14:30; 25:4) (Botterweck & Ringren TDOT III:215).

The *dal* included the indigent and indebted peasants who lived in serious economic difficulties without being totally impoverished or marginalised. These people likely still owned some land (Proverbs 13:23) and as a result were liable to taxation, especially unfair grain taxes that were paid to large landowners (Exodus 30:15; Leviticus 14:21). The prophets saw them as susceptible to unfair treatment in legal disputes (Isaiah 10:2; 11:4; Jeremiah 5:28), abused by the debt-slavery system (Amos 8:6), lacking grazing land (Isaiah 14:30; Jeremiah 39:10), and exploited and oppressed in an undefined way (Amos 2:7; 4:1).

*Dal*, at least in the prophetic texts, referred to the economically and politically marginalised people in society. Elsewhere, a clear picture of the *dal* is given by its use in describing the emaciated cows in Pharaoh's dream (Genesis 41:19), an interesting word-picture when applied to this group in society. The Psalms allude to unfairness in matters of the law, for God calls on the legislative body to judge the *dal* justly (Psalm 82:3). The wisdom literature describes this form of

poverty as one that is *the ruin of the poor* (Proverbs 10:15 NKJV), a foe which, when it comes to ‘friends’, *drives them away* (Proverbs 19:4 NLT). Lastly, evaluation of the body of texts containing the word *dal* offers the conclusion that they seem to be of an agricultural nature, referring possibly to small-time farmers (Howitt & Morpew [s.a.]).

### *v rûš*

A fifth word use for ‘poor’ is *rûš*, the root word implying *destitution*. It occurs 32 times in the Old Testament, often pointing to the circumstances common to the ‘lower class’ (Harris et al. TWOT II:841). David uses it in describing his unworthiness to marry Michal (1 Samuel 18:23) and Nathan uses this word in his parable to vividly illustrate the sin of King David against Uriah (2 Samuel 12:1-4).

The word commonly refers to that class of people who were known as the economically poor of modest means who were beggars. The majority of its appearances occur in the wisdom texts and is seen as a friendless form of poverty (Proverbs 14:20; 19:7; 28:3). At least in one text, Proverbs 18:23, the person is likely a beggar because he is described as petitioning the rich for assistance (Howitt & Morpew [s.a.]).

### *vi misəkēn*

The sixth word for ‘poor’ is *misəkēn*. This word only occurs in Ecclesiastes 4:13; 9:15-16. Since it is so scarce it is difficult to draw exact conclusions about its

meaning, although the general meaning is somewhat obvious in the contrast between the poor man and the king in Ecclesiastes 4:13. The Septuagint [LXX] helps define the distinction. The Greek *pen-ace* is used for the *misəkēn*, defining a *person who does not have extensive possessions and must work for his living* as opposed to the rich man who can live on his income without working. The *pto-chos*, the common translation in the LXX for ‘*anî*’, is the destitute beggar, showing a clear difference between the *misəkēn* and the ‘*anî*’. This is the distinction drawn for the passages in Ecclesiastes (Harris et al. TWOT 1:517).

### *vii makh-sore*

The seventh Hebrew word for ‘poor’ is *makh-sore* and usually denotes a *lack of, or need for, material goods*. It first occurs describing the decrease of the floodwaters covering the earth. It occurs 13 times in Scripture, most of those times in Proverbs where it refers to those who were poor as a result of *laziness* (Proverbs 6:1; 14:23; 21:5; 24:34) or *excessive living* (Proverbs 21:17) (Harris et al. TWOT 1:309). This is economic poverty brought about by one’s own actions, not by the actions of others.

In summary, the most common Old Testament descriptions of ‘the poor,’ as seen in various Hebrew word uses and contextual references, refer to *those who are impoverished due to calamity or through exploitation*. They are likely to have become poor through the often intentional activities of others, bringing them under God’s special attention. The prophets predict dire consequences against those who exploit or ignore these impoverished people. God is seen as

the protector and deliverer of the poor and he enjoins his people to be the same.

### 3.2.2 Categories of 'the poor' in the Old Testament

#### *i Widows*

In addition to the words referring to the poor or those in poverty, there are classes of people that would generally find themselves among those impoverished. In the Old Testament, the Hebrew word rendered *widow* is 'almānâ, which occurs fifty-six times.<sup>2</sup> The bulk of the contexts are legal in nature, dealing with justice (legislation protecting the widow) or injustice (exploitation of her standing). The term refers to a married woman whose husband has died and who has not remarried.<sup>3</sup> Widows were often quite vulnerable in society. Poverty, lack (Ruth 1:21; 1 Kings 17:7-12) and indebtedness (2 Kings 4:1) are the most likely descriptions of her economic state, since the main source of her financial support, her husband, had died.

#### *ii Orphans and the fatherless*

Another group receiving special attention in Scripture is the orphan. The Hebrew word for the *orphan* and *fatherless* is *yātôm*. It implies a person who has been *deprived of parents*, and is often associated with words like *desolate*, *without protectors*, and *comfortless*. *Yātôm* is first used in the Hebrew Scriptures in the earliest code of ancient Israel, the Covenant Code in

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<sup>2</sup> 'The Septuagint virtually always translates 'almānâ with the Greek term for widow, *chera*. The same Greek word occurs twenty-six times in the New Testament' (Kittel et al. TDNT IX:444).

<sup>3</sup> 'Alas I am a widow; my husband is dead.' (2 Samuel 14:5b)

Exodus 22:22. The *yātôm* were generally associated with the widow and the sojourner and were of special concern to God (Harris et al. TWOT 1:419).

Orphans and the fatherless had difficulties beyond the normal grief associated with the loss of parents. They lived in corrupt societies where the leaders were ‘often rebellious companions of thieves, acceptors of bribes, and unjust toward orphans and fatherless’ (Fish in Howitt & Morphew [s.a.]:32). There is evidence throughout Scripture of the orphans and fatherless being overwhelmed (Job 6:27), having their donkeys driven away (Job 24:3), being snatched from the breast (Job 24:9), being murdered (Psalm 94:6), not being defended, and their cause not pleaded (Isaiah 1:28; Jeremiah 5:28). They were also being robbed (Isaiah 10:2), and generally mistreated (Ezekiel 22:7).

Although their lot in society was normally very difficult for all of the above reasons, they were specifically included in the pilgrim festivals as was mandated by the Lord (Deuteronomy 16:11-14).

### **3.2.3 Evidence of ‘the poor’ in the New Testament [NT]**

The New Testament also contains a great deal about the physically and materially poor, painting a vivid word picture of this sociological group. This section attempts to systematically work through the books of the New Testament that define the characteristics of the poor through seeing the usage of the primary Greek word for ‘the poor’—*pto·chos*. The word occurs over 30 times, being used most commonly in the Gospels and especially the Synoptics.



It is the Greek equivalent of *‘anî* and *dal* (Kittel et al. TDNT VI:902).

*i The Gospels and the book of Acts*

The Gospel of Matthew makes four references in all to ‘the poor’, two of which are found also in Mark. In chapter 19:21, Matthew gives the directive given by Jesus to the rich young ruler a different turn by calling the giving away of possessions a symbol of completeness or perfection. ‘This makes the requirement more than an individual (single) instance but also restricts it to a higher stage of morality’ (Kittel et al. TDNT VI:903). Also, in Matthew 11:5, the last part of Jesus’ answer to the Baptizer’s question concerns the ‘poor receiving good news preached to them.’ It receives special emphasis by its placement at the end of the sentence and correlates to the work of the disciples sent out in Matthew 10 (Kittel et al. TDNT VI).

In addition, Matthew also contains more of a spiritual emphasis regarding poverty. For example, when Jesus admonishes the Pharisees for only cleaning the outside of the cup, Matthew has, ‘First clean the inside of the cup and the dish, and then the outside also will be clean’ (Matthew 23:26), while Luke has, ‘But give what is on the inside to the poor, and everything will be clean for you’ (Luke 11:39), a much clearer reference to physical poverty while indicating that Matthew may not be as interested in reflecting the problems of actual want as Luke would seem to be (Kittel et al. TDNT VI).

*Pto-chos* is used in three main contexts in the Gospel of Mark: the rich man; the widow's mite; and the anointing at Bethany (10:21; 12:42-43; 14:5-7).

There are, however, numerous indirect references to poverty, particularly in the lives of John the Baptizer (Mark 1:6; 6:17, 27) and Jesus (Mark 6:3; 11:12; 14:65; 15:15, 19). Mark also indicates the voluntary deprivation of both groups of disciples and the socio-economic status of Jesus' followers (Mark 1:18, 20; 2:23-25; 6:8-9, 36-37; 9:41; 10:28-31). It was a movement of 'the poor for the poor' (Howitt & Morphew [s.a.]:26).

Luke's general emphasis is on previously disadvantaged groups, so it is not surprising that he places emphasis in his writing of the Gospel on the poor. He has deep concern for the minorities (Luke 7:2, 34, 37, 39).

His version of the beatitudes is striking when compared to Matthew's: Jesus promises to those who are needy and abused that they will experience a reversal of their present circumstances and then threatens the rich and prosperous with the loss of their possessions (Luke 6:20-26).

In the Magnificat, Mary praises God because 'He has brought down the mighty from their thrones, and exalted those of humble estate; he has filled the hungry with good things, and the rich he has sent empty away' (Luke 1:52).

The rich fool is warned about the reversal of his fortune (Luke 12:13-21). Jesus also tells the rich young man, 'One thing you still lack. Sell all that you have and

distribute to the poor, and you will have treasure in heaven; and come, follow me' (Luke 18:22).

The parable of those seated at the table that find their positions reversed (Luke 14:7-11) is not about dining etiquette, but about the Messianic banquet. This is made clear by Jesus' exhortation on what banquets should actually look like:

He said also to the man who had invited him, 'When you give a dinner or a banquet, do not invite your friends or your brothers or your relatives or rich neighbours, lest they also invite you in return and you be repaid. But when you give a feast, invite the poor, the crippled, the lame, the blind, and you will be blessed, because they cannot repay you. For you will be repaid at the resurrection of the just' (Luke 14:12-14).

The rich are told to 'sell [their] possessions and give to the needy' (Luke 12:33). Clearest of all is the parable of the rich man and Lazarus which reaches this poignant climax, 'Child, remember that you in your lifetime received your good things, and Lazarus in like manner bad things; but now he is comforted here, and you are in anguish' (Luke 16:25). The rich man's failure, as indicated in this passage, is his ignoring the needy at his gate. The poor widow makes the greatest contribution because '... she out of her poverty put in all she had to live on' (Luke 21:4). The sign of the salvation that Jesus acknowledges in the life of Zacchaeus is that he gave half his possessions to the poor and made fourfold restitution for any dishonest gain (Luke 19:8, 9).

Luke's focus in his Gospel writings should not be taken as antagonism toward the rich. The key issue, as related throughout Jesus' teaching, is one's heart-attitude toward God. The rich fool is told: 'So is he who lays up treasure for himself, and is not rich toward God.' (Luke 12:21). A call to discipleship is a call

to a lifestyle that has implications for personal attitudes toward possessions. The disciples leave their homes to follow Jesus (Luke 5:11, 28; 18:28), making a decisive break with the past (Luke 9:57-62), which includes renouncing all that they had (Luke 14:25-33). The earliest Christian community was one where the disciples sold their possessions and distributed them to all who were in need (Acts 2:44, 45; 4:32-35) (Howitt & Morpew [s.a.]).

As the gospel spreads, it has a profound effect on the poor. A crippled beggar is miraculously healed (Acts 3:1-10). Sudden death comes to a couple who misrepresent the value they receive for the sale of their property (Acts 5:1-10), giving evidence that it is important to deal with possessions honestly. An early controversy has to do with the provisions providing support for widows (Acts 6:1-7). Tabitha, who was miraculously raised from the dead through Peter's ministry, 'was always doing kind things for others and helping the poor' (Acts 9:36 NLT). An angel says to Cornelius, 'your prayers have been heard and your gifts to the poor have been noticed by God' (Acts 10:31 NLT). The church in Antioch makes a significant contribution to the church in Jerusalem during the famine, recognising their responsibility to help out 'according to (one's) ability' (Acts 11:27-30).

Luke, it seems, wants to make a point here. The early New Testament church was proactive in its care of the poor so that everyone would have sufficient provision. Being part of the 1st century community of believers meant that one was actively involved in alleviating poverty, giving freely of personal

possessions especially to those within the body of believers. It is not surprising that members were daily being added to the church (Acts 2:47b).

## *ii The Pauline epistles*

Very little is mentioned sociologically about the *pto·chos* in the Pauline letters. In 2 Corinthians 6:10 (cf. 6:3-9), Paul lists his many afflictions, describing his own life as *pto·chos*. The list represents the types of injustices suffered by all those who are *pto·chos*, with poverty and deprivation being main elements. The remaining uses of the term appear in Romans 15:26 and 2 Corinthians 8 and 9 and specifically deal with Paul's collection for the poverty stricken Jerusalem church (Howitt & Morpew [s.a.]).

There have been studies conducted on the socio-economic level of the Pauline churches which reveal that many of the early Christian communities were made up predominantly of 'the little people' (*pen·ace*), which included neither the destitute nor the wealthy (Theissen in Howitt & Morpew [s.a.]). However, there is evidence of the clash between the rich and the destitute in cities like Corinth where the wealthy would eat and get drunk while those who were hungry and had nothing watched when they had gathered together for the Lord's Supper (1 Corinthians 11:17-34). Howitt and Morpew [s.a.] suggest that other areas such the spiritual gifts (1 Corinthians 12 and 14), and the need for 'love' (1 Corinthians 13) are also better understood against the backdrop of the socio-economic struggle which existed between the rich and the poor.

### *iii The book of James*

According to Hanks (in Howitt & Morpew [s.a.]), the New Testament writing which stands the closest to the prophetic view found in the Old Testament regarding poverty and oppression is James. Those to whom James directed his letter were likely not destitute (James 2:2), but were certainly not wealthy (James 2:6). Howitt & Morpew [s.a.] state that they were likely small farmers and artisans who owned little and lived sparingly. The beggars (*pto-chos*) in the region were characterised by shabby clothing (James 2:2) or were naked, possibly also lacking daily food (James 2:15-16). They were also the weak, needy and marginalised and included women (James 2:15) and the sick (James 5:14-15).

James points to several discriminatory and oppressive practices which he wants stopped: legal action taken against poor debtors (James 2:1-12, 2:6), rich farmers withholding the wages of their poor workers (James 5:1-6), and poor members being viewed less highly by the rich seeking entry into the church (Kittel et al. TDNT VI).

James desires the followers of Jesus to be a community of people who live a lifestyle that reaches out to the destitute, even though they live in a society typified by greed and oppression of the poor and weak (James 1:8, 21; 4:6; 5:19-20). Through his writing, James also speaks of the imperative of curbing the 'sin of the tongue,' a sin which, if unchecked, denies dignity, respect and justice to the poor in their communities (James 2:6-7). Finally, James emphasises the challenge of 'being a doer of the word' when it comes to

helping the poor. Failing to do this is tantamount to murdering them (James 5:6) and committing adultery with the world (James 4:4-6) (Howitt & Morphew [s.a.]).

#### *iv The book of Revelation*

Revelation 13:16 describes mankind according to classes, using 'rich' and 'poor' quite literally. On the other hand, in Revelation 2:9 the spiritual wealth of the church of Smyrna is contrasted with its material poverty and persecution. In Revelation 3:17, both concepts are contrasted and used figuratively: the supposed wealth of Laodicea is unmasked as poverty and the church is encouraged to reverse the situation (Kittle et al. TDNT VI).

### **3.2.4 Categories of 'the poor' in the New Testament**

Similar groups are mentioned in the New Testament that would normally be found among the poorest in society. This section identifies these groups and detail their hardships.

#### *i Widows*

Widows in the New Testament often found themselves in the same tenuous situation as those of the Old Testament. Their lives were often marred by many injustices. In Mark 12:40 and parallel gospel accounts, Jesus is portrayed as prophetically denouncing the scribes who were helping widows with their rights while at the same time charging such high fees that the widows were losing their possessions. Jesus continues this focus through his comment on the

widow who, through her trust and devotion, gives her whole living though it is quite meagre (Mark 12:41-44). A parable told in Luke 18:2-8 to illustrate perseverance in prayer also depicts a widow before a judge, helping to demonstrate that issues of a financial and legal nature were an integral aspect of 'widowhood' (Howitt & Morphew [s.a.]).

It seems that there were difficulties endured by the widows in the early church as well. Acts 6:1 states, 'Now in these days when the disciples were increasing in number, a complaint by the Hellenists arose against the Hebrews because their widows were being neglected in the daily distribution.' Apparently many Jews of the dispersion would retire to Jerusalem and leave their widows behind. Since the Palestinian believers managed the common funds, they would often neglect Hellenist widows as tension developed between the native group and the dispersion element. Thankfully, this tension was relieved by the intervention of the apostles and the appointment of seven deacons (Howitt & Morphew [s.a.]).

## *ii Orphans and fatherless*

The Greek word for orphan and fatherless is *or-fan-os*, meaning *bereaved, without parents*. Occasionally it is used in the figurative sense and means *abandoned, or deprived* (Kittel et al. TDNT V:487). It is used only twice in the New Testament, the first in James 1:27 to describe the kind of behaviour which should be afforded orphans and the fatherless and the second in John 14:18 to demonstrate Jesus not leaving the disciples 'orphaned,' i.e. abandoned or unprotected (Howitt & Morphew [s.a.]:33). 'The fatherless, widows and



foreigners each have about 40 verses in Scripture that command justice for them. God wants to make it very clear that in a special sense he is the protector and defender of these weak ones in society' (Sider 2005:56).

### **3.3 God's attitude toward 'the poor'**

When God displayed mighty acts throughout human history to reveal His nature and will, he also intervened to liberate the poor and oppressed. This is seen early in scripture as he moves to liberate the Children of Israel. God came to Moses in the burning bush to end the suffering and injustice experienced by the Children of Israel at the hand of the Egyptians. His power displayed against the Egyptians that led to the Exodus freed oppressed slaves:

Then the LORD said, 'I have surely seen the affliction of my people who are in Egypt and have heard their cry because of their taskmasters. I know their sufferings, and I have come down to deliver them out of the hand of the Egyptians' (Exodus 3:7-8a).

Although the liberation of slaves was not God's only purpose in the Exodus,<sup>4</sup> it was at the heart of His design (Sider 1977:28).

The introduction God uses for the Ten Commandments begins in this same revolutionary theme:

'I am the LORD your God, who brought you out of the land of Egypt, out of the house of slavery' (Deuteronomy 5:6). God desires to be known by His people as the Liberator of the Oppressed. One misses the intent of this momentous event in the lives of God's people unless one recognizes that at this pivotal point in the history, the 'Lord of the universe was at work correcting oppression and liberating the poor' (Sider 1977:28).

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<sup>4</sup> God also acted because of His covenant with Abraham, Isaac and Jacob. (Exodus 6:2-5, 8).

In addition, it appears from other Scriptures that God's behavior toward the poor displays his commitment to them. Sugirtharajah (in Howitt & Morpew [s.a.]:47) details these:

God has a concern for the poor. He listens to them (Psalm 69:33; 34:6; Isaiah 41:17). He delivers the needy when he cries (Psalm 72:12), setting him on high, far from affliction (Psalm 107:41). He gives to the poor (Psalm 112:9; 132:15), raising them up from the dust (1 Samuel 1:8; Psalm 113:7), and is their refuge and protector (Isaiah 3:13-15; 24:4 ff; 25:4; Zephaniah 3:12; Psalm 14:6). He consoles and comforts them (Isaiah 49:13), and is the helper of the fatherless (Psalm 10:13).

God vindicates the poor. He administrates justice for them (Deuteronomy 10:18; Job 36:6; Psalm 10:17; 25:9; 72:4; 82:3; 140:12), delivering them in their affliction (Job 36:15; Psalm 35:10; 72:12; 76:9; 82:3; Jeremiah 20:13) and defending the widow, the fatherless, and the stranger (Exodus 22:21-24; Deuteronomy 10:17-19; Psalm 68:5; 69:5; 82:3). God saves the needy from the sword (Job 5:15), and pleads their cause (Isaiah 51:22).

God also demands a like concern from His people (Exodus 22:21-24; Leviticus 19:10; Deuteronomy 15:1-11; 24:14; Isaiah 58:1-12; Jeremiah 7:5-7; Ezekiel 16:49; Zechariah 7:10), and from their king (Isaiah 11:4; Jeremiah 22:16; Psalm 22:1-4). And through the prophets, he zealously condemns every form of oppression (Amos 2:6-8; 4:1-3; 6:4-8; Micah 2:1-3; Isaiah 3:13-15; 10:1-4; Jeremiah 22:13f.; Ezekiel 34:1-24).

God's concern for the poor is so extreme that he goes beyond pleading their cause to actually identifying himself with them. 'He who oppresses the poor insults his Maker' (Proverbs 14:31), while to be 'kind to the poor' is to

'lend to God' (Proverbs 19:17). He sees them as 'his people' (Isaiah 3:15), extending himself to punish those who harm them (Job 22:9; Psalm 109:16; Isaiah 1:23-24; 3:13-15; Jeremiah 5:28-29; 22:3, 15-19; Ezekiel 16:48-50; 22:7, 14-15, 29-31; Amos 2:6; 4:1-3; 5:12-16; 8:4-8; Malachi 3:5) and blessing those who are good to them (Job 29:11-17; 42:12-16; Psalm 41:1; Proverbs 14:21; 17:5; 19:17; 29:14; Jeremiah 7:6-7; 22:3).

### **3.4 Scriptural provision for 'the poor'**

There were a number of principles or laws in Scripture that were instituted to prevent class distinctions and poverty from arising and gaining a foothold in society. In the relatively egalitarian society of small farmers as would be found in Israel, families would possess enough resources to earn a living that would have been regarded as sufficient and acceptable, not minimal. Although not every family would have the same income, each family would have equal economic opportunity, thereby enabling them to earn an income that would meet their basic needs and to also allow them to be respected members of their communities. Land ownership helped each extended family to acquire the necessities to obtain a decent livelihood through responsible work (Sider 2005).

#### **3.4.1 Old Testament prescriptive laws**

To help ensure that this equal opportunity remained in place, God instituted laws to guarantee that any economic disadvantages that may arise would be abated through the year of jubilee and the sabbatical year. In addition, other

prescriptive laws were put into place to ensure that those who were poor could still have ways to provide for themselves.

### *i Year of jubilee*

Through the year of jubilee (Leviticus 25:8-55), God desired to achieve a revolution in the Israelite society every 50 years. Its purpose was to avoid extremes of wealth and poverty among his people, thereby providing for restoration of prior economic status in most instances.

The basic points of the law were as follows:

- Freedom for all slaves and debtors (Leviticus 25:40-41). A parallel is seen in Israel's flight from Egypt depicted in the Exodus (Leviticus 25:38).
- Restitution of each clan's patrimony—a type of agrarian reform accompanied by the redistribution of wealth.

And you shall consecrate the fiftieth year, and proclaim liberty throughout the land to all its inhabitants. It shall be a jubilee for you, when each of you shall return to his property and each of you shall return to his clan (Leviticus 25:10).

This helps remind the nation of Israel of the conquests of Canaan and the equitable distribution of land as described in Joshua.

- Rest for the land, allowing it to lie fallow (Leviticus 25:11).

All of these provisions of the law related to freedom (of debtors, slaves, property, and even the land). Ezekiel referred to this time as 'the year of liberty' (Ezekiel 46:17). The jubilee was a physical reminder that helped Israel re-experience the events recorded in Exodus and Joshua.

The theological basis for this controversial command was that all of their possessions actually belonged to God and were merely on loan. Therefore, instead of being *owners*, they were to function as good *stewards* (Blomberg in Howitt & Morphew [s.a.]). 'Land will not be sold in perpetuity, for the land is mine. For you are strangers and sojourners with me' (Leviticus 25:23).

Before and after the year of jubilee, the land could be bought or sold. However, the buyer did not actually buy the land so much as he bought a certain number of harvests. 'If the years are many, you shall increase the price, and if the years are few, you shall reduce the price, for it is the number of the crops that he is selling to you' (Leviticus 25:16). But the selling of harvests came with a caveat: the sale must be fair. 'You shall not wrong one another, but you shall fear your God; for I am the LORD your God' (Leviticus 25:17).

The year of jubilee created a structure that affected everyone automatically. It also allowed for self-help and self-development so that once the land was returned, the poor person could once again provide for his own living (Sider 2005).

## *ii Year of sabbatical*

The Jewish seventh year of sabbatical was, in effect, a religiously mandated fallow year for all fields.

For six years you shall sow your land and gather in its yield, but the seventh year you shall let it rest and lie fallow, that the poor of your people may eat; and what they leave the beasts of the field may eat. You shall do likewise with your vineyard, and with your olive orchard (Exodus 23:10-11).

It is believed that the purpose for this was two-fold:

- Environmental: By not planting in the seventh year the land could be restored with the nutrients that would normally be removed during regular farming activities.
- Concern for the poor: God was ensuring that the poorest of the poor would be able to eat (Sider 2005).

Israelite slaves also received their freedom every seventh year (Deuteronomy 15:12-18), as poverty would sometimes force Israelites to sell themselves as slaves to pay off debts or to simply keep from starving (Leviticus 25:39-40). However, God decreed that slavery was not to be permanent and that when it ended the master was to share his produce with the slave:

And when you let him go free, you shall not let him go empty-handed. You shall furnish him liberally out of your flock, out of your threshing floor, and out of your winepress. As the LORD your God has blessed you, you shall give to him (Deuteronomy 15:13-14).

Finally, the sabbatical position on loans was the most radical of all (Deuteronomy 15:1-6). God decreed that every seven years all debts had to be cancelled (Deuteronomy 15:1), even adding that people were not allowed to refuse loans in the sixth year simply because the money would be lost in twelve months (Deuteronomy 15:9). As was the situation with the year of jubilee, the sabbatical year was brought about to ensure justice, not charity. As Sider explains, the relief of debts was instituted to prevent a widening gap between those who had capital and those without productive resources (Sider 2005). He further mentions that Deuteronomy 15 was both 'an idealistic statement of God's demand and also a realistic reference to Israel's sinful performance'

(2005:71). God knew that poverty would remain, hence the statement ‘Since there will never cease to be some in need on the earth, I therefore command you ...’ (Deuteronomy 15:11a). But this did not imply that he would allow everyone to go on with their lives and their business in total ignorance of the poor. On the contrary, his instituted law meant that those with means were expected to, ‘... open wide your hand to your brother, to the needy and to the poor in your land’ (Deuteronomy 15:11b). Sadly, there is evidence indicating that the sabbatical year was only practiced occasionally, which is suggested as one of the reasons why God punished Israel with exile in Babylon (Leviticus 26:34-35; 2 Chronicles 36:20-21).

### **3.4.2 Old Testament governing laws**

#### *i Protective laws on tithing and gleaning*

There were laws in addition to those mentioned above which, if practiced, were designed to aid specific groups such as the Levite, the poor, the sojourner, the widow, and the orphan. One such law requested the setting aside of one tenth of all farm produce, whether wine, animal or grain, as a tithe:

At the end of every three years you shall bring out all the tithe of your produce in the same year and lay it up within your towns. And the Levite, because he has no portion or inheritance with you, and the sojourner, the fatherless, and the widow, who are within your towns, shall come and eat and be filled, that the LORD your God may bless you in all the work of your hands that you do (Deuteronomy 14:28-29).

Another law, the law of gleaning, decreed that farmers should leave portions of their harvest, including the corners of their fields, untouched so that the poor could go and glean there:

When you reap the harvest of your land, you shall not reap your field right up to its edge, neither shall you gather the gleanings after your harvest. And you shall not strip your vineyard bare, neither shall you gather the fallen grapes of your vineyard. You shall leave them for the poor and for the sojourner: I am the LORD your God (Leviticus 19:9-10).

In the same manner, farmers were instructed not to collect forgotten sheaves left in the field, olive tree boughs were not to be ‘gone over again,’ and vineyards were not to be gleaned after grape collection (Deuteronomy 24:18-31).

### *ii Additional laws and commands regarding the poor*

In addition to the commands, laws, and principles previously mentioned, further emphasis concerning the ‘general poor’ appears in the following categories:

- Significant emphasis was placed upon ensuring justice for the poor. The Israelites were to guard against perverting the judgment of the poor in disputes (Exodus 23:6), showing partiality (Exodus 23:3), taking bribes (Deuteronomy 10:17), making use of dishonest scales, weights, ephah, and hin (Leviticus 19:36), oppressing the afflicted (Proverbs 22:22), and committing violence (Jeremiah 22:3). Instead, they were to ‘learn to do good; seek justice, correct oppression; bring justice to the fatherless, plead the widow’s cause’ (Isaiah 1:17).
- The area of money lending also provided evidence of care for the poor. The Israelites were prohibited from charging interest on loans (Exodus 22:25) or keeping a person’s pledge overnight (Exodus 24:12). Furthermore, collectors of the poor man’s pledge were not allowed to enter the houses of those who owed them. They were to stand outside



and wait while the man of the house went inside to collect the pledge. This ensured that adequate respect and dignity for the poor was upheld (Deuteronomy 24:10-11).

- Special conditions were laid down for the cleansing of ‘poor’ healed lepers. Instead of the customary fee, poor lepers were allowed to reduce the size of their fee.

But if he is poor and cannot afford so much, then he shall take one male lamb for a guilt offering to be waved, to make atonement for him, and a tenth of an ephah of fine flour mixed with oil for a grain offering, and a log of oil; also two turtledoves or two pigeons, whichever he can afford. (Leviticus 14:21-22a).

- The payment of wages was also mandated. The hired servant who was poor and needy was to be paid his or her wages each day before the sun went down (Deuteronomy 24:13).

### **3.5 Warnings concerning ‘the poor’**

Besides the numerous laws, commands and principles found in Scripture, there are also a number of warnings given that favour the poor. These warnings include the following:

#### **3.5.1 Curses**

Generally, the poor were a class of people who could fall prey to various forms of abuse more readily than others. Therefore, a warning in the form of a curse was issued to prevent this from happening. ‘He who gives to the poor will lack

nothing, but he who closes his eyes to them receives many curses' (Proverbs 28:27).

### **3.5.2 Reproach**

In the section in Proverbs dealing with the Wisdom of Solomon, the Israelites are warned that when the poor are oppressed it 'insults his Maker' (Proverbs 14:31). Those who oppress the poor in order to increase their wealth are also guaranteed the approach of personal poverty (Proverbs 22:16).

### **3.5.3 Cut-off**

Those who shut their ears to the cry of the poor will be cut off from the Lord. 'Whoever closes his ear to the cry of the poor will himself call out and not be answered' (Proverbs 21:13).

### **3.5.4 Death**

Ezekiel, in the section dealing with the refutation of a false proverb, warns those who oppress the poor and needy of grave consequences:

He oppresses the poor and needy. He commits robbery. He does not return what he took in pledge. He looks to the idols. He does detestable things. He lends at usury and takes excessive interest. Will such a man live? He will not! Because he has done all these detestable things, he will surely be put to death and his blood will be on his own head (Ezekiel 18:12-13 NIV).

### 3.5.5 Judgment

After the Israelites settled in the Promised Land, they discovered that God's passion for justice would be a two-edged sword. When God called his people out of Egypt and made his covenant with them, he gave them his law so that they could live together as a nation and with their neighbours in peace and justice. When they failed to obey, God punished Israel and eventually sent his chosen people back into captivity. The prophet's messages of warning were clear. Their disobedience was described as gross failure along two areas: idolatry and mistreatment of the poor (Sider 2005). The failure of Israel to heed these warnings eventually resulted in Israel's destruction and captivity.

The middle of the 8th century B.C.E. was a time of economic prosperity and political success unknown since the time of Solomon. But in the midst of this prosperity, God sent the prophet Amos to announce the unpopular news that God would soon destroy the Northern Kingdom. Amos saw first-hand the terrible oppression of the poor as the rich 'trample the head of the poor into the dust of the earth' (Amos 2:7). Amos saw that the extravagant lifestyle of the rich was built upon the backs of the poor, even to the extent that they bribed judges and turned the needy aside from the gate of the city (Amos 5:11-12). Therefore, the kingdom would be destroyed and the surviving residents taken into exile, which happened only a few years after Amos had spoken.

## 3.6 New Testament provisions for ‘the poor’

First century Christians reaffirmed the Old Testament teachings through their behavior as they responded to the physical needs evident around them, especially those needs seen in the early church communities. This followed the lead of Jesus as he identified his mission to his mainly Jewish audience.

### 3.6.1 The incarnation

Christians believe that God revealed himself most completely in Jesus of Nazareth, so to more fully understand God’s activity in the world and to know what true Christian praxis and commitment demands, it is important to understand how Jesus defined his mission. In Luke 4:18-19, Jesus identifies his mission by quoting the prophet Isaiah:

The Spirit of the Lord is upon me, because he has anointed me to proclaim good news to the poor. He has sent me to proclaim liberty to the captives and recovering of sight to the blind, to set at liberty those who are oppressed, to proclaim the year of the Lord’s favour (Luke 4:18-19).

After reading these words, Jesus informed his audience that he was the fulfilment of this Scripture,<sup>5</sup> portraying the past and present human situation in realistic terms. (Howitt & Morphew [s.a.]). The words of Jesus are analysed more closely in the following section.

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<sup>5</sup> By the time that Jesus finished in the synagogue, this audience had turned into an angry mob that tried to throw him off a cliff. (Luke 4:29)

## *i The poor*

Jesus' priority in his mission was to turn his attention to the poor, who literally dominated the Palestinian population at that time.<sup>6</sup> He was poor himself as is described in the following ways:

- born in a stable;
- came from a poor family;<sup>7</sup>
- was a refugee;<sup>8</sup>
- was an immigrant in the land of Galilee;<sup>9</sup>
- humbly submitted Himself to John the Baptist's baptism;<sup>10</sup>
- warned a potential disciple of the type of lifestyle to expect by saying that He had no home.<sup>11</sup>

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<sup>6</sup> 'A very similar case scenario resides in Africa today' (Howitt & Morphew [sa]:51).

<sup>7</sup> The offering that was presented for purification after the birth of Jesus showed that his parents were a poor couple. They could not afford a lamb, so they brought a pair of doves or pigeons (Luke 2:22-24). This sacrifice was according to the Law of Moses found in Leviticus 12:8.

<sup>8</sup> Now when they had departed, behold, an angel of the Lord appeared to Joseph in a dream and said, 'Rise, take the child and his mother, and flee to Egypt, and remain there until I tell you, for Herod is about to search for the child, to destroy him.' And he rose and took the child and his mother by night and departed to Egypt and remained there until the death of Herod. This was to fulfill what the Lord had spoken by the prophet, 'Out of Egypt I called my son.' (Matthew 2:13-15).

<sup>9</sup> But when Herod died, behold, an angel of the Lord appeared in a dream to Joseph in Egypt, saying, 'Rise, take the child and his mother and go to the land of Israel, for those who sought the child's life are dead.' And he rose and took the child and his mother and went to the land of Israel. But when he heard that Archelaus was reigning over Judea in place of his father Herod, he was afraid to go there, and being warned in a dream he withdrew to the district of Galilee. And he went and lived in a city called Nazareth, that what was spoken by the prophets might be fulfilled: 'He shall be called a Nazarene' (Matthew 2:19-23).

<sup>10</sup> Then Jesus came from Galilee to the Jordan to John, to be baptized by him. John would have prevented him, saying, 'I need to be baptized by you, and do you come to me?' But Jesus answered him, 'Let it be so now, for thus it is fitting for us to fulfill all righteousness.' Then he consented' (Matthew 3:13-15).

John was a prophet who challenged the rich to show sincere repentance by sharing what they had with the poor.

And the crowds asked him (John), 'What then shall we do?' And he answered them, 'Whoever has two tunics is to share with him who has none, and whoever has food is to do likewise' (Luke 3:10-11).

<sup>11</sup> And a scribe came up and said to him, 'Teacher, I will follow you wherever you go.' And Jesus said to him, 'Foxes have holes, and birds of the air have nests, but the Son of Man has nowhere to lay his head' (Matthew 8:19-20).

All of this gives evidence that when Jesus addressed the poor he did so from a position of equality, not superiority. Jesus was familiar with poverty, suffering, hunger, mourning and ostracism. The apostle Paul summarises Jesus incarnation as follows: 'For you know the grace of our Lord Jesus Christ, that though he was rich, yet for your sake he became poor, so that you by his poverty might become rich' (2 Corinthians 8:9).

### *ii The captives*

In 1st century Palestine, as is the case in many third world countries today, the poor and oppressed were trapped with no way of improving their situation. Therefore, many 'prisoners' were not murderers, rapists or other violent criminals, as they would have been executed for their crimes. In 1st century Palestine, most prisoners were imprisoned because they could not afford to pay back their debtors<sup>12</sup> (Westermann in Howitt & Morphew [s.a.]:53 footnote). The implication, then, is that when Jesus was referring to the 'captives and prisoners,' he was not referring to two separate groups, but one: *the poor*, imprisoned because of their debt and poverty (Howitt & Morphew [s.a.]:53).

### *iii The blind*

For Jesus to include 'the blind' in the same categories as the poor and the captives suggests that he thought of them as part of the same needy group.

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<sup>12</sup> See Matthew 5:25-26; 18:30; Luke 12:57-59.

It is interesting that poverty appears in the context as a related circumstance in six of the seven instances that Luke mentions the blind.<sup>13</sup>

#### *iv The oppressed*

Jesus described the poverty stricken as oppressed. As has been previously mentioned, it seems that *oppression* and *injustice* are the main causes of poverty in the Bible. Old Testament Hebrew uses twenty verbal roots that show up more than five hundred times describing oppression' (Howitt & Morpew [s.a.]:53). In the face of this, Jesus offers Himself as the solution to the suffering and disillusionment of those in poverty. He did this in the following ways:

#### *v The bringer of 'good news'*

Jesus went about proclaiming the 'good news.' This was a radical message, one that had a revolutionary impact upon society. 'The actual "good news" which he came to proclaim was that the Kingdom of God had arrived, which he ushered in through his ministry by announcement and demonstration, and through his death and resurrection. It is important to note that it was aimed at the poor' (Howitt & Morpew [s.a.]:54).

#### *vi The proclamation of freedom*

Part of the coming of the Kingdom of God was Jesus' proclamation of liberating the oppressed: 'He has sent me to proclaim liberty to the captives, and

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<sup>13</sup> See Luke 4:18; 7:21-22; 14:13, 21; 18:35. Also see the year of jubilee provision (Leviticus 25:35; Isaiah 58:7) for providing shelter for the poor and homeless mentioned in Luke 14:13,21 (Hanks in Howitt & Morpew [s.a.]:53 note).

recovering of sight to the blind, to set at liberty those who are oppressed’ (Luke 4:18). According to Hanks,

[t]he church has often fallen into the trap of legitimizing the oppression that the established order maintains. Many Christians wish to preach a gospel of socio-political freedom to the poor, whereas others want to offer forgiveness of sins to the rich. Jesus, however, did not offer us the alternative of spreading two gospels. His gospel is one of freedom for the poor, which is bad news for the rich unless they genuinely repent, identify with the poor and share their goods with them (Howitt & Morphew [s.a.]:54).

### *vii Recovery of sight to the blind*

Jesus’ mission statement also included providing ‘recovery of sight to the blind’ (Luke 4:18). John the Baptizer tested Jesus’ authenticity as the Messiah by sending his disciples to Jesus. Jesus responded to their questions by saying:

Go and tell John what you have seen and heard: the blind receive their sight, the lame walk, lepers are cleansed, the deaf hear, the dead are raised up, and the poor have good news preached to them (Luke 7:22).

Jesus’ response has to do with what is being accomplished through his work, which identifies him as the Messiah. Things are happening through him that go way beyond the claim to a title.

### *viii Proclamation of the year of the Lord’s favour*

This may be the most dramatic part of Jesus’ mission statement, referring to the year of jubilee (Leviticus 25) discussed earlier in this chapter. The jubilee was implemented to prevent massive class distinctions between the rich and the poor and, had Israel followed this law, it would have solved many of the extremes of wealth and poverty that occurred in society.



According to Hanks (in Howitt & Morphew [s.a.]), Jesus taught his disciples to practice jubilee in the following ways:

- Not by sowing, reaping or harvesting, but by living by faith, always trusting that God will provide for one's needs. (Matthew 6:25-26, 31-33; Luke 12:29-31).
- By remitting all debts (Matthew 5:40-42; Luke 6:33; Luke 12:30-33, 16: 1-15).
- By redistributing wealth (Luke 11:42; Luke 12:30-33; Acts 2:44-45; 4:32-37).

### **3.6.2 Early church community**

Radical, positive economic relationships established in the new community of believers were endorsements of the Old Testament teaching concerning care for the poor. There was wide-scale sharing in the earliest Christian church:

Now the full number of those who believed were of one heart and soul, and no one said that any of the things that belonged to him was of his own, but they had everything in common (Acts 4:32).

There is abundant evidence that the early church continued the pattern of economic sharing practiced by Jesus (Acts 2:43-47; 4:32-37; 5:1-11; 6:1-7). The Gospel writer Luke records (Acts 2:44), immediately after noting the conversion at Pentecost of three thousand, that 'all who believed were together and had all things in common.' Physical needs were met by sharing, which included personal property being freely sold to aid the needy within the fellowship (Acts 4:36-37; 5:3-4).

God's promise that the obedience of Israel would eliminate poverty (Deuteronomy 15:4) reached fulfillment in the early church community. They ate meals together with 'glad and generous hearts' (Acts 2:46b) and experienced unity, being of 'one heart and soul' (Acts 4:32). This was a new community defined by the visible transformation of their lives, which included personal economics (Sider 2005). The impact of this transformation was striking: their number was growing dramatically (Acts 2:47b) and 'with great power the apostles gave their testimony to the resurrection of the Lord Jesus ...' (Acts 4:33).

They organised systems to ensure that economic needs were met justly. As mentioned earlier in this chapter, it appears that the Jerusalem church included a significant minority of Hellenists—Greek speaking Jews or possibly Greeks that had converted to Judaism. Somehow, the Hebrew-speaking majority had overlooked the needs of the Hellenist widows. When this injustice was brought to the attention of the apostles, they responded by choosing seven men to look after the minority group, with all seven being members of the minority group that had been discriminated against. Actions like this (Acts 6:7) resulted in 'the number of disciples (multiplying) greatly in Jerusalem' (Sider 2005).

The early NT church did not insist on economic equality or abolish private property. Peter attests to this when he reminds Ananias that he was under no obligation to either sell his property or donate the proceeds from the sale to the church (Acts 5:4). Sharing was not compulsory, but voluntary. It seems that

genuine love and care for others in the community was the motivation for donating personal possessions. Some, in fact, did not donate everything. John Mark's mother, among others, retained her own house (Acts 12:12) and additional passages indicate that others retained property as well.

But the essence of the economic relationships in the early Christian community indicates a deep caring for one another. Their sharing was not superficial since regularly and repeatedly, '... they sold their possessions and goods and distributed them to all, as any had need' (Acts 2:45). If the need was greater than what was available, they simply sold property. The needs of fellow members of the faith community became the deciding factors, not legal property rights or financial security. 'For the earliest Christians, oneness in Christ meant sweeping liability for and availability to the other members of Christ's body' (Sider 2005:79).

But followers of Christ must not let their generosity end with other Christians. Jesus teaching not only permits, but requires his followers to extend care for the poor and oppressed outside of the faith. The story of the Good Samaritan teaches that anybody who is in need is one's neighbour (Luke 10:29-37). Matthew 5:43-45 is even more specific:

You have heard that it was said, 'You shall love your neighbour and hate your enemy.' But I say to you, Love your enemies and pray for those who persecute you, so that you may be sons of your Father who is in heaven. For he makes his sun rise on the evil and on the good, and sends rain on the just and on the unjust.

Jesus forbids his followers to be concerned only for their neighbours who would normally be members of their own ethnic or religious group. Instead, he

commands his followers to imitate God, who does good for everyone (Sider 2005).

But the command actually goes much deeper. In Matthew 22:35-40, a lawyer asked Jesus a question to test him. He asks, 'Teacher, which is the great commandment in the Law?' The reply of Jesus is stunning, particularly if serious consideration is given to its ramifications:

And he said to him, 'You shall love the Lord your God with all your heart and with all your soul and with all your mind. This is the great and first commandment. And a second is like it: You shall love your neighbour as yourself. On these two commandments depend all the Law and the Prophets' (Matthew 22:37-40).

It is correctly understood that the Great Commandment tells mankind to love God. This injunction of Jesus would not surprise his first century hearers, nor those of the 21st century. What is stunning, however, is the level of care that is expected toward 'our neighbours.' Jesus tells this lawyer that he must love his neighbour in the same way that he loves himself. It is normal to expect one to love oneself, which is what Jesus assumes. But what he adds here is that as one wishes to be loved, he must love his neighbour, meaning that as man naturally wants the best for himself, so he must equally desire the best for his neighbour. John Piper describes it this way:

He (Jesus) commands, 'As you love yourself, so love your neighbour.' Which means: As you long for food when you are hungry, so long to feed your neighbour when he is hungry. As you long for nice clothes for yourself, so long for nice clothes for your neighbour. As you desire to have a comfortable place to live, so desire a comfortable place to live for your neighbour. As you seek to be safe and secure from calamity and violence, so seek safety and security for your neighbour (1996:283).

The ramifications are quite radical. 'In other words, make the measure of your self-seeking the measure of your self-giving' (Piper 1996:283).

The general theme that runs through this Chapter and appears as a common refrain throughout the Scriptural record is this: God desires that his people live together in community in such a way that all families would have the resources to earn a decent living and that those who could not care for themselves would be generously provided for. God reveals his attitude toward the weak and what he correspondingly expects of the strong. This principle is the basis for the Old Testament provisions for jubilee, the sabbatical year, tithing, and gleaning.

The New Testament presupposes this revelation and reinforces it. Paul associates the Old Testament obligation of justice with Christian responsibility for the poor (2 Corinthians 9:9-10). Jesus, in his ethical teaching and practice, stands in the tradition of the prophets; an understanding of Jesus or New Testament ethics is not possible except in the light of that continuity.

Woe to you, scribes and Pharisees, hypocrites! For you tithe mint and dill and cumin, and have neglected the weightier matters of the law: justice and mercy and faithfulness. These you ought to have done, without neglecting the others (Matthew 23:23).

Two aspects of this passage are worth noting:

- Jesus carries on the prophetic attack against all piety that leaves out social justice.
- He clearly indicates the place of the Old Testament teachings about justice, reflecting the highest level of Old Testament ethics essential to his new order (Mott 1982).

The obligation to do justice makes followers of Jesus responsible for the conduct of society in a comprehensive way. Mott elaborates on this, affirming that '[w]herever there is basic human need, we (Christians) are (obligated) to help to the extent of our ability and opportunity' (1982:77). 'Do not hold back good from those who are entitled to it, when you possess the power to do it' (Proverbs 3:27), sums up this teaching and indicates how to relate it to varying circumstances, including 'not only our personal resources but also our class position and political opportunities' (Mott 1982:77).

The ministry of Jesus exemplified Old Testament guidelines while also opening up generous living to those outside the structures of the community of faith by instructing his followers to not only help to meet the needs of 'family,' but that their reach should be wide enough to include anyone in need. Jesus fulfilled Scripture by demonstrating what living by faith with generosity toward others was intended to look like. As a result of the generosity of the early church, Christians grabbed the attention of first century communities and had a powerful evangelistic impact. The force of that economic sharing provides a useful, yet radical, model for today's global church. When Scripture commands transformed economic relationships among God's people and then describes God's blessing on his people as they implement his commands, there is a functional model that is applicable for modern day worship (Sider 2005).

The biblical record of teaching and practice that relates to the community of faith's responsibility to those in need is striking. The Bible clearly details God's desire for transformed economic relationships among his people. It is essential

that the church implement the Scriptural principles that it claims are its mandate in the communities where it exists.

According to Sider (2005), Scripture offers two crucial clues about the nature of the economic justice that God demands from his people. First, God desires that all people have the opportunity to earn a modest living and be dignified members of the community. It seems clear from the Old Testament laws God's role as the protector and defender of the poor was designed to protect people from perpetual poverty. Part of Jesus' mission was 'bringing good news to the poor.' Undoubtedly then, it was the role of the church to take an active role in poverty alleviation and extend generosity toward those in need in the early NT church community. It was the responsibility of the church then—and now—to work to structure society so that all those able to work would have access to the resources needed to earn a decent living in the general economy.

Second, God desires that those who cannot work are provided for out of the generosity of those who can. The remarkable growth of the early Christian community is testimony to the power of such practical ministry.

#### **4 Biblical Movements In Response To 'The Poor'**

Some recent theological movements have developed in response to the poverty and oppression that has confronted them in their communities. Judged as one of the most significant and pressing issues to confront Christians all around the

world, especially in the last 40 years, has been what Gustavo Gutiérrez calls ‘the irruption of the poor’:

Our time bears the imprint of the new presence of those who in fact used to be ‘absent’ from society and from the church. By ‘absent’ I mean: of little or no importance, and without the opportunity to give expressions themselves to their sufferings, their comradeships, their plans, their hopes ... They have been turning into active agents of their own destiny and beginning a resolute process that is changing the condition of the poor and oppressed of this world (Gutiérrez 2007:xx).

The question of the poor was considered in a first world perspective as being seen as only one of a number of social ills that generated concern for the renewal of society. Theological reflection was happening contextually while aiming to make the theology of the poor an integral part of the gospel (Lamprecht 1993).

These movements have grown from the acknowledgement by Christians that the Church must be involved in meeting the needs of those in extreme poverty. Although this list is not comprehensive, some of these movements have developed as follows.

#### **4.1 Liberation theology**

The term ‘liberation theology’ could, in theory, be applied to *any theology which concerns oppressive situations* (McGrath 2005). However, in practice the term is used to refer to a quite distinct form of theology which has its origins in the Latin American situation in the 1960s and 1970s. In 1968, the Roman Catholic bishops of Latin America gathered for a congress in Medellín, Colombia. This meeting—often known as CELAM II—sent shock waves throughout the region



when it acknowledged that the church had often sided with oppressive governments and declared that in the future it would be siding with the poor. The basic themes of Latin American liberation theology may be summarised as follows:

- Liberation theology is oriented toward the poor and oppressed, stating that ‘God is clearly and unequivocally on the side of the poor.’ This understanding leads to the view that the poor occupy a position of special importance in the interpretation of the Christian faith. All Christian theology and mission must begin with the ‘view from below’ with the sufferings and distress of the poor (McGrath 2005:116).
- Liberation theology involves critical reflection on practice. Gutiérrez writes that liberation theology is ‘a critical reflection on Christian praxis in light of the word of God,’ drawing on Karl Barth when he said that, ‘the true hearer of the word is the one who puts it into practice’ (2007:xxix). McGrath points out that whereas classical Western theology regarded action as the result of reflection, liberation theology inverts the order where action comes first, followed by critical reflection (2005).

Liberation theology has indebtedness to Marxist theory. Many western observers criticise the movement for this reason, seeing it as an unholy alliance between Christianity and Marxism (McGrath 2005). But liberation theologians vigorously defend their use of Marx for two major reasons. First, Marxism is seen as a ‘tool of social analysis’ which allows insights to be gained concerning the present nature of Latin American society—or any society, for that matter—and the means by which the situation of the poor may be remedied (Gutiérrez

2007). Second, it provides a political programme by which the present unjust social system may be dismantled and a more equitable society created. Fundamentally, liberation theology is intensely critical of capitalism and affirmative of socialism. Liberation theologians refer to Thomas Aquinas' use of Aristotle in his theological method, arguing that they are merely doing the same thing—'using a secular philosopher to give substance to fundamentally Christian beliefs' (McGrath 2005:116). An essential component of liberation theology declares that God's preference for and commitment to the poor is a fundamental aspect of the gospel, not something added that arises from the situation in Latin America or is based purely in Marxist political theory (McGrath 2005).

Liberation theology has major significance to recent theological debate, significantly impacting two key theological issues:

- Biblical hermeneutics—Scripture is read as a liberation narrative, particularly emphasising the liberation of Israel from bondage in Egypt, the prophet's denunciation of oppression, and Jesus' proclamation of the gospel to the poor and outcast. It is read out of a concern to apply its liberating insights to the plight of the disenfranchised, not necessarily from the standpoint of wishing to understand the gospel.
- The nature of salvation—liberation theology has tended to equate salvation with liberation and stresses the social, political, and economic aspects of salvation with particular emphasis upon the notion of 'structural sin,' noting that it is society rather than individuals that is corrupted and requires redemption. Its critics state that

liberation theology has reduced salvation to a 'purely worldly affair, neglecting its transcendent and eternal dimensions' (McGrath 2005:117).

It seems clear that Liberation theology has galvanised action on behalf of the poor. The critique provided by proponents of this theology regarding the inconsistencies and hypocrisy of much that is seen in the modern church should certainly be brought into discussion. Its focus on the oppressed and poverty-stricken wherever they are found has brought attention to the fact that God has not forgotten the oppressed and that Jesus understood his mission as of reconciliation on many levels, as has been previously mentioned: preaching good news to the poor, proclaiming release to captives, bringing sight to the blind, freeing the oppressed, and proclaiming the acceptable year of the Lord.<sup>14</sup>

Howitt and Morphew ([s.a.]) suggest that the equal and probably more damaging inconsistencies and hypocrisy of much liberation theology need to be pointed out. It is a basic hermeneutical premise that only by immersing oneself in the biblical world, finding biblical praxis, and accepting biblical thought forms will one then be able to fully hear the biblical message (Kirk 1979). Liberation theology claims to be a theology of praxis, arising from the context of human suffering and from that vantage point confesses a total break with Western theology. However, if the origins of liberation theology are traced, it becomes apparent that it actually found its foundations in Western theology, most notably

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<sup>14</sup> Some try to avoid the clear meaning of Jesus' words by spiritualizing this text, but in their original Old Testament context they referred to physical oppression and captivity. Luke 7:18-23 contains a similar list in which Jesus clearly refers to material, physical problems (Sider 1977).

the traditions of Hegel, Marx, and Moltmann. Its claim to be a theology of praxis is specious (Howitt & Morphew [s.a.]).

Furthermore, Liberation theology offers a disturbing underlying commitment to a worldly philosophy that allows for compromise on violence as a legitimate means to an end and blindness concerning the gross violation of human rights in societies which have been built upon the social engineering of Marx and Hegel. Recent history proves that the 'liberal, capitalist' Western societies, which are so problematic to liberation theologians, have a far better human rights record than do the societies espousing the 'collectivist social theories' of this theology (Howitt & Morphew [s.a.]:127).

## **4.2 Black liberation theology**

Black liberation theology is closely related to Liberation theology. It developed in America and South Africa in the 1960's and 70's (Lamprecht 1993). It required that to participate at all in the movement, you 'must become black.' Lamprecht says the question is not, 'What is our duty to the poor?', but rather, 'How can we be freed from poverty?', thereby shifting the perspective to the questions normally put to traditional theology (1993:59). Black theology seeks to 'analyze the black condition in the light of the Gospel revealed in Jesus Christ,' as free as possible from the overtones of exegesis done in traditional settings while reflecting on the nature of the Gospel from the perspective of black people living in poverty and oppression (Lamprecht 1993:59).

The movement made several decisive affirmations of its theological distinctions during 1969. The National Committee of Black Churchmen emphasised the theme of liberation as a central motif of Black theology as follows:

Black Theology is a theology of black liberation. It seeks to plumb the black condition in the light of God's revelation in Jesus Christ, so that the black community can see that the gospel is commensurate with the achievement of black humanity. Black Theology is a theology of 'blackness.' It is the affirmation of black humanity that emancipates black people from white racism, thus providing authentic freedom for both white and black people (Conn 1983a:338).

James Cone offers his theological commentary on 'Black Power' in his first book, *Black theology, black power* (1969), which helped to define the movement of 'American theology in black' (Conn 1983a:339). Cone's theme, and that of many who respond to him, becomes the affirmation of black identity and the essential worth of 'blackness.' Harvey Conn points out that '[t]heology becomes an existential tool for Cone, a tool with which he seeks to make Black Power "an expression of hope, not hope that whites will change the structure of oppression, but hope in the humanity of black people"' (1983a:339).

The movement shifted in scope from the liberation movement in Latin America. Conn argues that for Blacks mainly in America, the primary enemy is racism while the Latin Americans defined as principle enemy the economic imperialism of the Northern nations, particularly the USA. Blacks, therefore, could not declare solidarity with them (1983a).

Following publication of his second book, *Black theology of liberation* (1970), Cone was generally considered to be the most significant writer within the

movement. The central theme of the book is that God is concerned with the black struggle for liberation, so much so that he identified with the oppressed—‘God was Black’ (McGrath 2005:118). He further argues that the gospel cannot then be addressed to the needs of the oppressed unless it is addressed in partisan terms, meaning that American theology must be black theology because ‘blackness’ is the mark of oppression in the American society. Cone defines the Gospel as the ‘black Christ providing the necessary soul for black liberation, the divine act of liberation that makes blacks free to define themselves and their own world, divine identification with the alienated’ (Conn 1983a:377). The hermeneutical centre around which theological elements such as Christology, ecclesiology, and eschatology are reconstructed is the revelation of God in Christ as the Liberator of the oppressed from social oppression and to political struggle. ‘Through that revelation the poor recognize that their fight against poverty and injustice is not only consistent with the gospel but is itself the gospel’ (Conn 1983a:377). The doctrine of God begins with God’s blackness. By stating that God is the Creator, Cone says it means:

‘that my being finds its source in God. I am black because God is black! God as creator means that he is the ground of my blackness (being), the point of reference for meaning and purpose in the universe ... There is no place in Black Theology for a colorless God in a society when people suffer precisely because of their color’ (Cone 1970:120).

Both ‘liberation theologies’ use different theological tools than have normally provided structure in the past, relying upon social analysis and the disciplines of sociology, politics, economics and modern history instead of philosophical inquiry. Conn suggests that there are profound differences between the two methods, raising the charges of ‘the sociologization of theology’ (1983b:398).

Anthony Evans declares the 'major mistake of many black theologians as (having spent) more time exegeting theological systems, the black experience and black culture, than the Scriptures. Sociology does not make good biblical theology' (Conn 1983b:398).

In spite of what appears to be reaching theological premises, these two closely related theological voices understood properly that poverty and racial oppression could not be left unchallenged without ignoring Scripture. God is on the side of the poor and oppressed, but not on their side alone. Theology, therefore, cannot be developed outside of its original context without it being misinterpreted. This failure of methodology has allowed much that has happened within the movements to be justified without acknowledging that the end result is not Scriptural.

### **4.3 Evangelical theology**

The 1974 Lausanne Congress on World Evangelicalism achieved consensus across a broad cross-section of evangelical leaders from around the world in defining the Gospel and the task of the church. Although the Lausanne Covenant which emerged from the conference painted these definitions in broad strokes, it did not avoid tackling certain controversial issues such as, 'Christian social responsibility, the Church's captivity to culture, the disunity of evangelicals in evangelism and the need for affluent Christians to simplify their lifestyle' (Kirk 1985:14). The covenant seemed to provide a new charter for those in the evangelical community by combining, 'firmness about fundamental beliefs with humility, hope with repentance, trust in the power of the Spirit to

renew the church with a call to sacrificial living, and acknowledgment of freedom in Christ with a call to responsible discipleship' (Kirk 1985:14).

However, since that time there has been a strong move in certain Evangelical circles to interpret both the Gospel and the task of the church in much narrower terms. A committee from the Lausanne Congress convened a consultation in Pattaya, Thailand in 1980 with a threefold purpose: to review the progress of world evangelisation since 1974; to produce reports and documents focused on outreach strategies for different people groups; and to discuss the future of the committee. According to Kirk, the Consultation was a great disappointment. He writes that the Consultation affirmed,

a view of evangelism linked to the theory of mission known as Church Growth,' which defines evangelism as, 'the verbal communication of a particular message in such a way that the number of converts to the Christian faith are maximised. Evangelisation, then, is the strategy that possesses a definite, measurable goal, a limited time-scale (end of the century), and an efficient means of communication ... The tragedy of this 'emaciated' view of evangelism is not only that it conveniently ignores fundamental biblical teaching ... but its proponents appear to be blind to its cultural roots in the Western economic tradition of free enterprise, pragmatism, success and organisational efficiency (1985:15).

A group of participants to the Consultations from Africa produced a draft statement of concern drawing attention to the damage done to world evangelisation by evangelical leaders who deny the Gospel in the political and economic policies that they support. This statement eventually became a *Statement of Concern* on issues of social justice and their relation to world evangelisation. It requested guidelines on socio-political involvement in the light of the Lausanne Covenant, 'in order that World Evangelisation might be more



credible and, therefore, more effective' (Kirk 1985:15). It was received without being taken very seriously by the Committee.

Modern evangelicalism often fails to ask seriously enough what the Gospel is actually all about. Kirk elaborates:

The battle is not so much for evangelism as for the biblical gospel. The struggle is to discover how personal evangelism, social involvement, personal integrity, growth in the knowledge of God and in Christian fellowship can all be related together as indispensable parts of a total Christian witness (1985:16).

This is the mission that encompasses biblical evangelism.

The actual ministry of Jesus was true to this mission; Jesus spent considerable time ministering to marginalised people of every description. He healed the sick and the blind, fed the hungry, and warned his followers that if they did not feed the hungry, clothe the naked, and visit the prisoners they will experience eternal damnation.<sup>15</sup> One of the most fundamental reasons for Christian concern for the poor and oppressed is that at the moment in history when God became man, his mission was to liberate the poor and oppressed. He summons those

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<sup>15</sup> Matthew 25:31-46 [ESV]

When the Son of Man comes in his glory, and all the angels with him, then he will sit on his glorious throne. Before him will be gathered all the nations, and he will separate people one from another as a shepherd separates the sheep from the goats. And he will place the sheep on his right, but the goats on the left. Then the King will say to those on his right, 'Come, you who are blessed by my Father, inherit the kingdom prepared for you from the foundation of the world. For I was hungry and you gave me food, I was thirsty and you gave me drink, I was a stranger and you welcomed me, I was naked and you clothed me, I was sick and you visited me, I was in prison and you came to me.' Then the righteous will answer him, saying, 'Lord when did we see you a stranger and welcome you, or naked and clothe you? And when did we see you sick or in prison and visit you?' And the King will answer them, 'Truly, I say to you, as you did it to one of the least of these my brothers, you did it to me.' "Then he will say to those on his left, 'Depart from me, you cursed, into the eternal fire prepared for the devil and his angels. For I was hungry and you gave me no food, I was thirsty and you gave me no drink, I was a stranger and you did not welcome me, naked and you did not clothe me, sick and in prison and you did not visit me.' Then they also will answer, saying, 'Lord, when did we see you hungry or thirsty or a stranger or naked or sick or in prison, and did not minister to you?' Then he will answer them, saying, 'Truly, I say to you, as you did not do it to one of the least of these, you did not do it to me.' And these will go away into eternal punishment, but the righteous into eternal life.

who follow him to do the same (Sider 2005). This is the central reason for the followers of Jesus to have concern for the poor and is a clear mandate that requires action.

The question in all of this is not, 'Shall we take theological sides?' But neither is it simply with whom are we already siding and with whom should we be siding? Conn states that the question should rather be, 'with whom are we *already* siding and with whom *ought* we to be siding, and *how?*' (1983b:409) He firmly believes a middle-class evangelical mentality can actually,

tranquilize our churches in the face of the suffering of our neighbours. A liberation mentality can make the depth of our concern superficial by inverting evangelism into activism. One flattens the whole gospel into a two-dimensional spiritualization. The other flattens it into a two dimensional externalization (1983b:409).

The result is that neither side actually presents the message of the gospel in a way that is truly Scriptural, that is 'brings the whole gospel to the whole man in the whole world' (Kirk 1985:17).

## 5 Conclusion

The church gains legitimacy in society only as it interacts in a meaningful way with those outside its walls. Scripture is clear that the mandate for the 'people of God' is to work to free those trapped in poverty, serving those both inside and outside of the community of faith. As the church has been identified as having a critical role to play, it is to be seen as to whether or not it will actually obey the clear teachings of Scripture. It seems that the failure to act decisively in putting

into motion plans and activities that will seriously address poverty and its related issues would bring into question whether the church truly has a viable purpose for its continued existence as the source for ushering in God's kingdom.

## CHAPTER 5

### HOW SHOULD WE RESPOND?

We seem to have retreated into religion as private practice rather than infusing political action with spiritual understanding (Ramphela 2008:20).

#### 1 Introduction

The preceding chapters have identified a range of serious issues that plague society. They must be addressed if South Africans ever hope to fully live in the freedom that was won in 1994. Everyone has a role to play. But the church cannot afford to sit idly by while men and women throughout the nation continue to live in the despair and hopelessness caused by intense poverty and the conditions that exist when poverty grips a nation.

Biblical evidence leaves no doubt that the poor and oppressed in society receive special attention from God. It is also plain that those who love God are particularly responsible for bringing relief to the poor and oppressed. But, as was mentioned in Chapter 4, most modern churches fall far short of the biblical model seen in the early church. The physical care taken for each other was one of the defining characteristics of the early Christian church community. It was one of the ways that the church transformed a pagan empire. Imagine the impact, therefore, that the modern church could have upon society if its

activities corresponded with equal measure to the emphasis placed upon care for the poor and oppressed as seen in Scripture.

This chapter documents one church's efforts as a role player in poverty alleviation for the greater Langa community of Cape Town. While this approach is neither the only way to engage in poverty alleviation, nor even the extent of what should be done in fulfilling the strong mandate given in Scripture, it is a useful start.

In 2000, as a response to a massive shack fire in the Joe Slovo informal settlement in Langa, the Pinelands Methodist Church began a project called *Phambili ngeThemba*, Xhosa meaning *Going forward with hope*; it is now a registered non-profit organisation and public benefit organisation.<sup>1</sup> Hundreds of homes had been destroyed, leaving thousands destitute. Volunteers from Pinelands Methodist became involved in emergency relief efforts and quickly became aware of the underlying developmental needs in Joe Slovo. Many in this community were poorly educated, unemployed and living in extreme poverty (see Chapter 2:41).

Although emergency relief was necessary and useful, there remained tremendous challenges in assisting members of this community in ways that would enable them to provide for themselves. As has been previously discussed (see Chapter 3:48), alleviating poverty is more than simply distributing necessary physical resources. Training interventions are required

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<sup>1</sup> Respective registration numbers: NPO 055 644; PBO 930027366.

that focus upon individuals for the purpose of building dignity and self-respect while also considering the practical tools necessary for local market related employment activities. A group of volunteers from the church began teaching basic sewing to small groups of mainly women in the hope that they would be able to either find jobs in the sewing industry or operate their own businesses making clothes or doing clothing repairs.

The group hired a sewing instructor and established a training centre in Langa at the Vineyard Baptist Church adjacent to the Joe Slovo community. Although this training provided help for some, there was little economic opportunity available for those who completed the instruction. These volunteers also became involved with the Chris Hani Independent School, a small primary school in the Joe Slovo community comprised of shipping-container classrooms and a small group of very dedicated teachers that were working primarily as volunteers. *Phambili ngeThemba* functioned as a support structure, helping with life-skills training, art instruction, Bible teaching and general school maintenance. They also began an orphan support programme that supplies food for approximately 30 children. When the Chris Hani Independent School closed in 2009, the church continued its supporting role in the Mokone Primary School, a government school in Langa to which most of the Chris Hani children were transferred. The orphan support programme continues from that location as well.

In 2007, the *Phambili ngeThemba* leadership team approached *Learn to Earn*, with the intent of establishing a partnership that would construct a development

model that could be used to specifically address the intense poverty and affiliated unemployment that exist in the Langa community. Based in Cape Town's Khayelitsha Township, *Learn to Earn* is a non-profit organisation involved in holistic development of the unemployed. The desire of *Learn to Earn* to replicate its training model resulted in the establishment of the *Learn to Earn Association*, with *Phambili ngeThemba* becoming its first member. The primary step in the membership process was to develop a specific community intervention for the unemployed and disadvantaged residents of the Langa community. This was to be conducted through a thorough community analysis undertaken by *Learn to Earn* and assisted by *Phambili ngeThemba*. The geographical parameters of the analysis included the community of Langa and the surrounding business communities of Athlone, Pinelands, Epping Industrial Areas 1 and 2, Ndabeni and the Klipfontein Road corridor near Langa.

Six aims were identified for the Langa research:

- Mapping of the institutional landscape of the geographical areas specified.
- Identification of employment, market and product opportunities and the presence of businesses in and surrounding the Langa area.
- Verification of the desired qualities sought by business for prospective employees.
- Evaluation of the availability and strengths of resources within the community of Langa.
- Determination of the major challenges, constraints and needs facing the Langa community, as indicated by community members participating in the Focus Groups.
- Quantification and qualification of each of these aims.

(Delport & van Wyk 2008)

The overall research process used to meet these aims is illustrated in the flowchart in Figure 5.1 below (Delpont & van Wyk 2008:4).

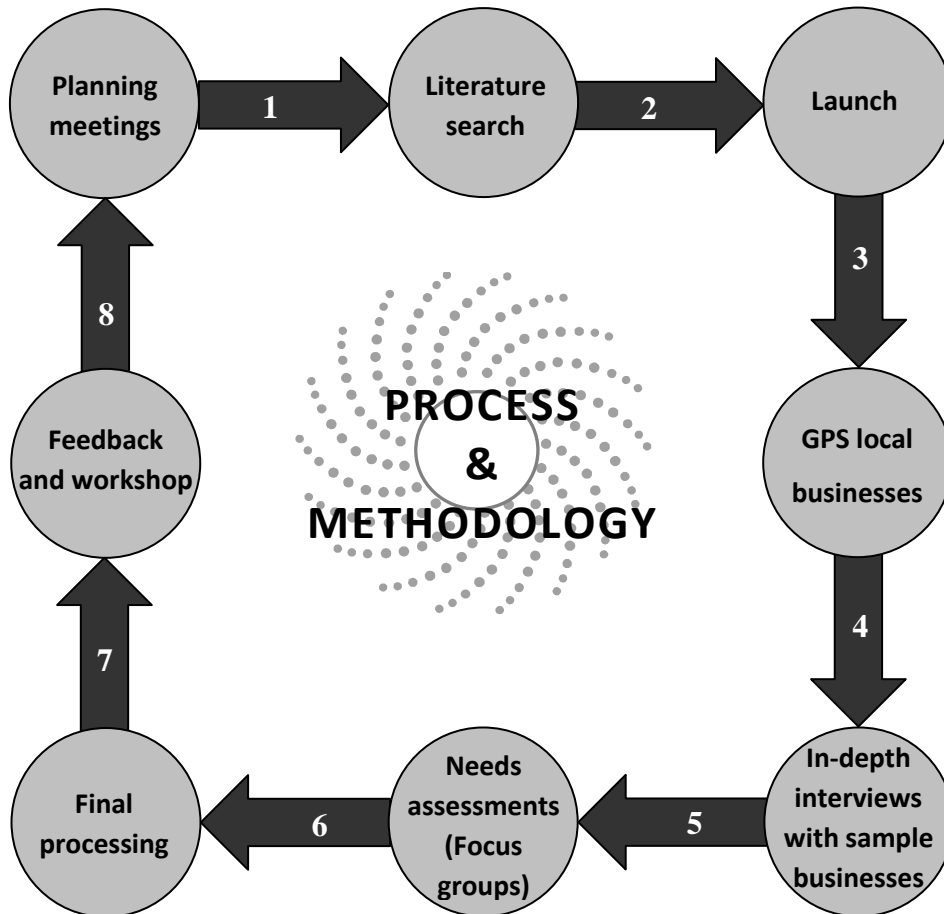


Figure 5.1: Research process and methodology - 2008 (Delpont & van Wyk 2008:4)

This research process is interactive and cyclical with each phase being continuously evaluated and revised if necessary. The research methodology was structured to engage the residents of the Langa community in all levels of the research process in the hope of fostering community ownership of the project from its inception. Thus, the research itself served as the beginning of a community intervention process by introducing *Phambili ngeThemba* as a capacity-building agent to the Langa community. It further works as a marketing



tool to promote *Phambili ngeThemba* as an employee resource for the targeted business community.

The multi-disciplinary research approach combines quantitative and qualitative data collection with social sciences tools and techniques, seeking to provide accurate results in line with the research objectives.

The research process was divided into four phases that are summarised as follows:

- The first phase of the research looked at the institutional landscape of the research area, including places of social influence. Research teams systematically gathered data from the identified business areas and plotted business location coordinates with a hand-held GPS device.
- The second phase involved taking the processed data from phase one and selecting a number of these businesses for an in depth interview using random proportionate sampling. The aim of the interviews was to gain further insight into what the businesses require for their entrance-level staffing needs and then ascertain possible employment opportunities.
- The third phase identified three focus groups in a needs assessment of the Langa residential community using a technique called the Priority Index (P-Index) research technique. By using a measuring scale (*Schutte Scale*) that is a reliable measurement for both literate and non-literate persons, this technique distinguished between the actual needs of the community and their perceived needs or wants.

- The fourth phase analysed the research to determine appropriate interventions that reflect the actual needs of both the Langa residential community and the local business communities.

The planning phase of the research began on 8 August 2007 with a meeting between members of *Phambili ngeThemba* and *Learn to Earn* to discuss the vision, scope, time schedules and objectives of the research project and the basic format of the questionnaires and presentation techniques. These meetings continued on an ongoing basis. A pamphlet for distribution was developed introducing the *Phambili ngeThemba* and *Learn to Earn* organisations and partnership and explaining to the business communities the purpose of the research. (See Appendix 1)

At the same time a team of twenty-four fieldworkers was enlisted to conduct the institutional mapping phase of the research. This team consisted of students from the University of Cape Town, Varsity College, and members of the Vineyard Baptist Church in Langa. A training day was held on 29 August 2007, during which they were taught how to work with a basic hand-held GPS device and how to record the captured data. The training also included basic interpersonal skills and interviewing techniques.

## **2 The Literature Search**

The background literature search for the Langa community found reports of similar research conducted in 2004 by the Unit for Religion and Development

Research [URDR] at the University of Stellenbosch (2004) in partnership with Transformation Africa for the general area of Langa/Athlone. While the research had used a similar process, the ultimate aims of that research were:

- Establishment of the major challenges facing society (such as HIV/AIDS, crime, violence, poverty and unemployment, racism, sexism and family crises)
- Quantification of these factors—in location and extent
- Assessment of the potential impact of the Church on the community

(URDR 2004:5).

This most recent community analysis includes places of social and economic significance, the nature of their activities, and the availability of employment opportunities. This information would hopefully assist in the identification and evaluation of job vacancies and the necessary skills or training needed to fill available positions. The goal, therefore, is to establish interventions that are contextual, market-related, and product-related so that unemployed people may obtain positions in the nearby business sectors. The Chamber of Commerce provided additional information regarding all of the companies within the research area that have more than thirty employees, thereby charting the basic market and industry trends to note during the research.

### **3 The Launch**

The research process was launched on 3 September 2007 from the Pinelands Methodist Church. The selected fieldworkers were strategically split into teams of two or three, were briefed on the areas where they would be working and then transported to their particular research location.

### **4 The GPS Phase – Institutional Mapping**

The first phase of the research took place from 3-7 September 2007. While the purpose of the GPS phase was to map the institutional business landscape of the research area including places of social influence, it was not limited to only those activities occurring inside buildings. To prevent the unnecessary and time-wasting duplication of data, the teams of fieldworkers were apportioned to cover the different areas and given area maps with demarcated boundaries. The teams worked systematically, capturing GPS co-ordinates for all of the formal and informal business locations as well as manually recording any additional information that was observed.

The data points gathered were then plotted onto corresponding maps to identify the location of each business in the community and its physical relation to other businesses. The fieldworkers also collected literature from the businesses to which they gained access and handed out flyers explaining the purpose of the *Phambili ngeThemba* initiated research project. This was seen as the first

interface between the business community and *Phambili ngeThemba*. (See Appendix 2 for a template of the data collection sheet used for this purpose)

## **5 In-depth Interviews With Sample Businesses**

The second phase of research involved assembling the raw data collected in the GPS phase of the research and selecting a sample of businesses to be interviewed to ascertain desired employee characteristics, basic entry level requirements, and potential unmet business opportunities. This phase of the research has the added benefit of being a marketing and public relations campaign for *Phambili ngeThemba*, resulting in fundraising opportunities and network development. It also proved a good indicator of the general attitude of the businesses in the area towards poverty and development issues.

The methodology for the selection of businesses was random proportionate sampling, a variation of stratified random sampling and the technique most often used when subgroups in the sample population vary dramatically in size. In this instance, businesses were divided into sectors, namely manufacture, wholesale, retail, service, petrol and import-export. These sectors were then further divided into sub-categories with the results shown on the following page:

- **Manufacture:**
  - Industry
  - Food
  - Clothing
  - Other
- **Retail:**
  - Hardware
  - Groceries
  - Food
  - Fast Food
- **Wholesale:**
  - Food
  - Other
- **Service:**
  - Motor
  - Accommodation
  - Other
- **Petrol and Import/Export**

Furthermore, the sampling intentionally examined geographical variations to determine if any unique opportunities and factors of influence exist as a result of physical location. Rather than draw equal numbers of businesses in each sector, the businesses were surveyed according to their representation in the designated research area. Within these sectors sampling was purposeful for the simple reason that some businesses require a higher entry-level skill. Thus, the focus rather was on categories where *Phambili ngeThemba* would be most able to provide training resources that would impact the largest number of people. These interviews took place between 10 October and 29 November, 2007 and ultimately included 34 local businesses (See Appendix 3 for sample business questionnaire).

## 6 The Needs Assessment (Focus Groups)

A needs assessment of the Langa community was conducted concurrently with the businesses interviews. It is important to determine what the actual needs of the community are. De Wet Schutte explains that a need:

can only be actual if it is what the community regards as important for its development at a given time ... (so) it follows that if we can succeed in identifying the actual needs of a given community, the timing will be automatically right (2000:7).

During the last three weeks of November 2007, three community focus groups from Langa consisting mainly of unemployed individuals and/or those working part-time or irregularly were facilitated one per week respectively.

The composition of the groups was random, based upon those able to attend at the specified time of 10:00 am to 12:30 pm on a weekday. The first group consisted of 13 people, the second of 11, and the third of 17, with an age range of 18-55 years. The focus groups were conducted in English, although a Xhosa-speaking interpreter was available throughout the group facilitation. The probability for success of any social development intervention depends upon the three core issues described by Schutte: (i) the degree of bonding by residents within a community, (ii) the satisfaction of basic human needs, and (iii) the satisfaction of individuals' social needs. The satisfaction of such needs can be met negatively or positively (2000).

The purpose of the needs assessment was to determine the social development needs of the members of the community. The assessment technique used was the Priority Index (P-Index) research technique as modeled by Schutte (2000). The threefold advantage of this particular technique is its simplicity in usage, prioritisation of actual needs as opposed to perceived needs or wants, and its non-verbal measurement instrument (the *Schutte Scale*) which proves accurate for the spectrum of literacy levels.

This technique distinguishes between the importance and the priority of a need within the community. The needs arising within group discussions are brought forward by the group members (community members) themselves, thereby ruling out the opportunity for 'steering' by the facilitator. In prioritising needs, the scale is used to first measure an individual's perception of the importance of the need, followed by his or her satisfaction with how it is currently being met. This is done by rating needs on a scale from 1 to 11, where 1 is the lowest and 11 is the highest. For example, an item may rate as a need of high importance, but the group members may indicate that it is being sufficiently addressed, thus giving it a low priority. An item indicated as both important, and unsatisfactorily met would be registered as a high priority. (See Appendix 4 for the Focus Group needs assessment questionnaire used for discussions).

The second phase of the needs assessment involved creating a community profile based on the data collected during the group facilitations. This report defines overall community satisfaction in relation to thirteen basic human needs listed by Schutte. The first six needs refer to the requirements necessary for survival, while the remaining seven social needs relate to the interaction between humans. The needs are as follows:

- |                |                |
|----------------|----------------|
| 1. Shelter     | 7. Safety      |
| 2. Health care | 8. Income      |
| 3. Sanitation  | 9. Education   |
| 4. Water       | 10. Recreation |
| 5. Food        | 11. Religion   |
| 6. Energy      | 12. Welfare    |
|                | 13. Transport  |

(2000:23)



The third phase of the needs assessment involves determining the level of social bonding within the community. Bonding looks at social relationships between community members and focuses on three important areas:

- A sense of belonging to the community
- Friendship circles and social relations
- The social support system perceived by community members in times of need or crisis.

## 7 The Results Of Analyses

The results of the Langa community analysis are divided into two sections:

- The first discusses the needs indicated by the *sample businesses* relating to desirable employee qualities and training needs. It also highlights employment opportunities and potential opportunities for entrepreneurship within the business areas.
- The second focuses on the *Langa residential community needs assessment* and discusses the results and possible intervention strategies.

### 7.1 Business analysis

#### 7.1.1 Desirable employee qualities and values

This section focuses on the qualities and values that businesses desire in their employees and is divided into 3 categories.

- The first category is personal values. The majority of the business respondents (73.5%) indicated that a high ethical standard (including for example, integrity, honesty, trustworthiness, etc) was the most desirable quality in an employee, much more important than vision, drive or ambition (17.6%).
- The second category illustrates organisational qualities, sometimes referred to as ‘Business IQ.’ These qualities are generic in nature and are depicted by a graph ranking importance as indicated by the business respondent (see Figure 5.2 below).

Respondents rated each category from their perspective as a quality they would desire in an ideal employee. It doesn’t mean that other qualities are unimportant, but only that the ranking has been established by what each employer believed to be most important.

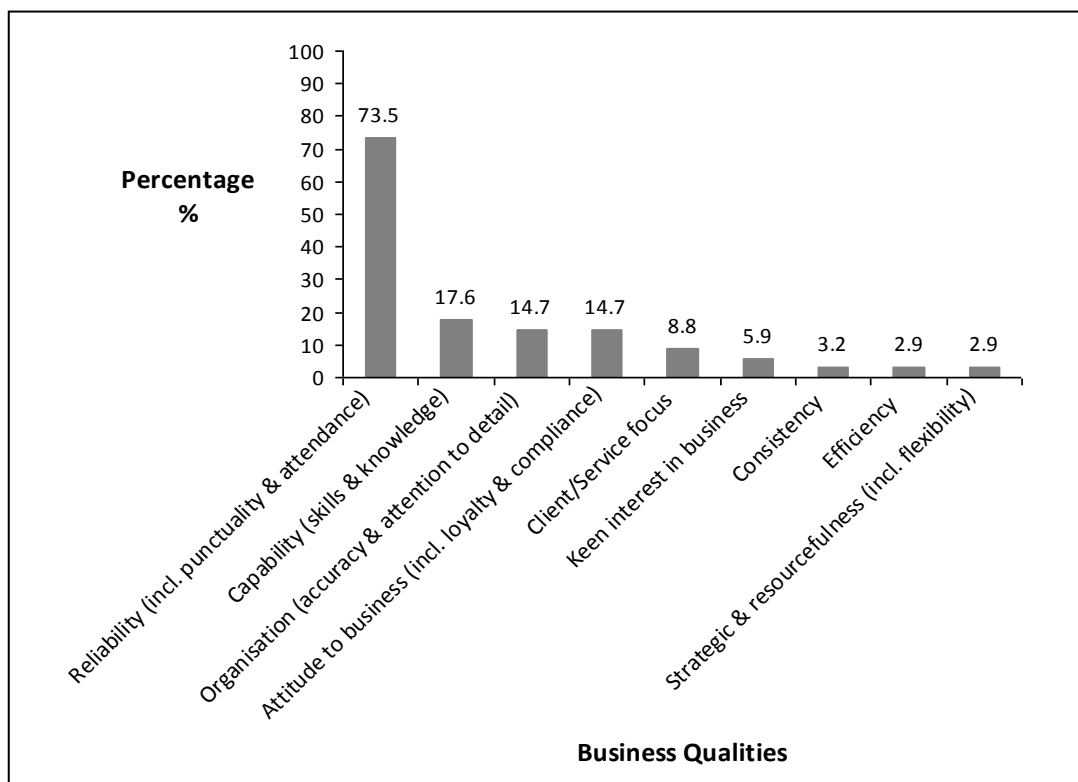


Figure 5.2 Business organisational qualities – Business IQ - 2008 (Delport & van Wyk 2008:10)

- The third category is ‘Social IQ and EQ’ and depicts qualities that are more general in focus but quite essential in a work environment. Social intelligence [IQ] and emotional quotients [EQ] are often reflective of personality traits in an individual. Another graph indicates the results of this survey. (see Figure 5.3 below).

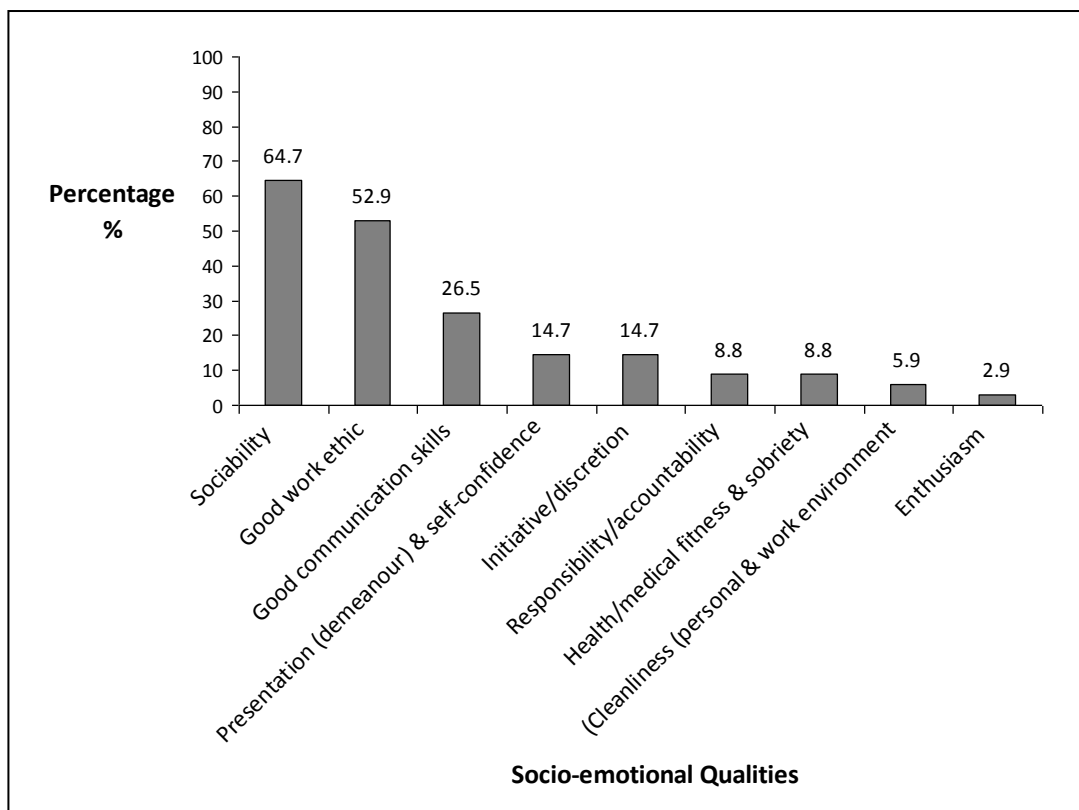


Figure 5.3: Social IQ and EQ - 2008 (Delport & van Wyk 2008:11)

These three categories are quite helpful for formulating training designed to help unemployed people become more employable. In combining the categories, employers highly value employees that have unquestionable ethical standards, are reliable, and get along well with colleagues. Employees should also have a good work ethic. Other qualities may also be important to certain

employers, but they were not rated highly among these business respondents during personal interviews.

Training specifically structured that enables prospective employees to develop or hone these desired characteristics has great benefit in that it directly matches employer-prescribed qualities. Upon completion of training, successful participants can be put forward to employers as prospective job candidates specifically trained to the business respondent’s specifications.

### 7.1.2 Job market opportunities

The questionnaire results also revealed what entry-level opportunities were available within the respective businesses surveyed. General conversation with these respondents indicated that hundreds of jobs were available, but remained unfilled due to a lack of qualified applicants. The following jobs were indicated as entrance level in the Greater Langa business community:

*Table 5.1: Sector opportunities with base-line or entry-level jobs*

SECTOR OPPORTUNITIES	BASE-LINE / ENTRANCE LEVEL JOB
▪ <b>Manufacture: Industry</b>	<ul style="list-style-type: none"> <li>- Shop floor assistant (cutting, bending, reinforcing – e.g. steel)</li> <li>- General labour (moving, carrying, cleaning)</li> <li>- Packers (i.e. goods/materials onto shelves, into packaging for dispatch, or into machines)</li> </ul>
<b>Food</b>	<ul style="list-style-type: none"> <li>- Cleaners</li> <li>- Packers</li> </ul>
<b>Clothing</b>	<ul style="list-style-type: none"> <li>- Packers</li> <li>- Receiving and Sending (i.e. materials in–clothing/produce out)</li> </ul>



SECTOR OPPORTUNITIES	BASE-LINE / ENTRANCE LEVEL JOB
▪ <b>Manufacture: Other</b>	<ul style="list-style-type: none"> <li>- Packers</li> <li>- General labour</li> <li>- Machine operator</li> <li>- Seamstress – sewing</li> </ul>
▪ <b>Wholesale: Food</b>	<ul style="list-style-type: none"> <li>- Packers</li> <li>- Order-makers (e.g. fruit and vegetables for client)</li> <li>- Cleaners</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>- Warehouse assistant</li> <li>- Stock controller</li> <li>- Pickers and packers</li> <li>- Forklift operators</li> </ul>
▪ <b>Retail:</b>	
<b>Hardware</b>	<ul style="list-style-type: none"> <li>- General worker (floor assistant)</li> </ul>
<b>Groceries</b>	<ul style="list-style-type: none"> <li>- Cashiers</li> <li>- Till packers</li> <li>- Shelf packers</li> <li>- General assistants</li> </ul>
<b>Food</b>	<ul style="list-style-type: none"> <li>- Store hand</li> <li>- Bakers</li> </ul>
<b>Fast Food</b>	<ul style="list-style-type: none"> <li>- Cleaners</li> <li>- Kitchen workers (cooking and cleaning)</li> </ul>
▪ <b>Service:</b>	
<b>Motor</b>	<ul style="list-style-type: none"> <li>- All-rounder (Mechanic to work on custom servicing)</li> </ul>
<b>Accommodation</b>	<ul style="list-style-type: none"> <li>- Cleaners</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>- Counter person (to work with customers)</li> </ul>
▪ <b>Petrol:</b>	<ul style="list-style-type: none"> <li>- Petrol attendant</li> </ul>
▪ <b>Import/Export:</b>	<ul style="list-style-type: none"> <li>- Warehouse assistants</li> <li>- Cleaners</li> <li>- Pickers</li> <li>- Car/van jockey</li> <li>- Tea-maker</li> <li>- Girl-Friday</li> </ul>

(Delpont & van Wyk 2008:12)

The table (5.1) above indicates a clear opportunity for a warehousing course. A course of this nature would focus on aspects of warehousing, such as:

- Packers course, including lifting and handling goods
- Stock rotation and stock control
- Order-making
- Dispatching procedure
- Goods-receiving procedure
- Forklift or Hyster operation
- Health and safety
- Warehouse maintenance and cleaning

The course should equip individuals to work at most levels within the warehouse/factory environment. Courses of this nature may also be targeted to the specific needs of businesses if a demand becomes evident.

### **7.1.3 Staff training opportunities**

The following list indicates training needs requested by businesses relating to current employees:

- Literacy and Numeracy
- Life skills—includes nutrition, drug awareness, attitude, personal responsibility, accountability and problem-solving
- Computer skills
- Basic business skills (including basic finance)
- Management and leadership skills
- Technical skills—machine operation
- Carpentry skills
- Geography (map reading)
- Sales

These training needs could serve as additional income-stream opportunities for *Phambili ngeThemba* and value-added service to the local business community.

#### 7.1.4 Entrepreneurial opportunities

Other opportunities for employment were indicated by business respondents as indirect needs that could be filled to provide a service for the existing businesses and their employees. Meeting these specific needs presents other training possibilities. Opportunities mentioned are as follows:

- a number of business respondents indicated the need for a cafeteria to provide a place for employees to eat, reasoning that a cafeteria in closer proximity would minimise or eliminate the costly time and travel needed for worker's meals.
- a day-care facility for employees' children would be seen as a more convenient and secure employee benefit.
- a lunch venue that a local business would be willing to outsource. (Whether that would be useful for job creation would need to be determined.)

Additionally, many businesses lack promotional material or work-related literature. This further suggests an opportunity for training people in computer graphic and design skills that would in turn provide these services for a fee to the local business community. Other needs were: delivery personnel, staff transport, services offered in security, typing, sewing and handymen. Although further research would be needed, it seems likely that other employment-generating opportunities could exist.

## 7.2 Residential analysis

An adequate needs assessment should also include a survey of the residential community in Langa. The *Nominal Group Technique* [NGT] was used with Langa residents with focused discussions being conducted with 3 groups totaling 36 people. The points of discussion centred upon resources within the community, needs of the community, and community bonding.

Focusing upon resources within the community emphasises individual empowerment and helps to restore dignity and self-respect. It brings to light the strengths of the community and helps to identify areas where they are able to help themselves, as opposed to highlighting only their needs and weaknesses.

Community bonding involves three elements: social services available to assist those needing help within the community, socialisation within the community (i.e. friendship circles) and a sense of belonging to the community. Bonding increases the likelihood of the community members changing their environment through personal involvement.

The questions asked during the nominal group discussions are contained in Appendix 4. The results of the nominal group discussions are illustrated below in a chart (see Figure 5.4) that is followed by a brief explanation of each point (see Table 5.2).

It should be noted that when reading the graph (see Figure 5.4 on the next page), the P-Index is a measuring technique which establishes the priority of the items in question by subtracting the mean scores indicating the overall



satisfaction with the current state of affairs from the mean scores of the overall importance attached to the items in question. For the community resources chart (see Figure 5.4 below), the lower the P-Index score, the better the resource (for example, St Francis with a P-Index of -0.62 is perceived as a better resource than the local old age home, which has a P-Index of 6.69). The respective comments regarding the resource are formed by the responses from the community.

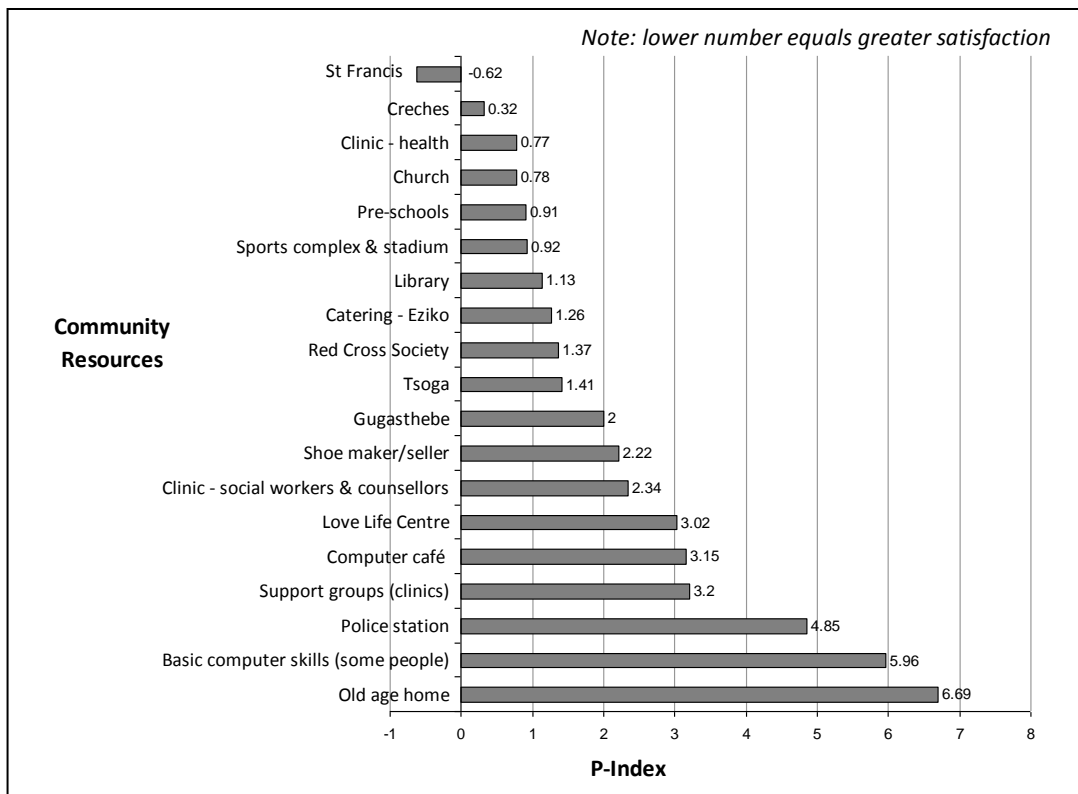


Figure 5.4: Community resources chart indicating satisfaction levels with existing community resources - 2008 (Delport & van Wyk 2008:18)

## 7.2.1 Top community resources in Langa as measured by the P-Index

Table 5.2: Top community resources in Langa as measured by the P-Index

Community Resource	P-Index =	Resource
<b>St Francis</b>	<b>- 0.62</b>	Adult education centre run by the Langa Catholic Church. It has been running for about 20 years and is well known within the community. It offers courses that enable adults to finish school (obtain Matric), and to obtain basic skills, for example sewing.
<b>Crèches</b>	<b>0.32</b>	The crèches in the area allow parents to put their children in a safe place while they work or seek employment. The parents feel secure knowing that their children receive good care.
<b>Clinic</b>	<b>0.77</b>	The clinic is free which is important for those in Langa who are sick (especially those with TB or HIV/Aids) seeking medical help.
<b>Church</b>	<b>0.78</b>	The churches provide a place for positive moral influence, especially for the children.
<b>Pre-schools</b>	<b>0.91</b>	The pre-schools are considered safe places for parents to leave their children while they are seeking employment. Under the right guidance, pre-schools also provide a positive start to the education and socialization of children.
<b>Sports stadium/complex</b>	<b>0.92</b>	It is a venue where people can come together to play various sports or to observe and support sports. Hosting sporting events here would also bring others into the community.
<b>Library</b>	<b>1.13</b>	The library keeps literacy alive by allowing community members access to resources. Knowledge brings people closer to empowerment and the library is seen as a vehicle for this process.
<b>Catering – Iziko</b>	<b>1.26</b>	A coffee shop/restaurant that doubles up as a training centre to teach people how to cook.
<b>Red Cross Society</b>	<b>1.37</b>	The Red Cross Society has been very active in crisis intervention, especially providing aid during the shack fires. They are also active in helping the homeless with basic resources.



<b>Community Resource</b>	<b>P-Index =</b>	<b>Resource</b>
<b>Tsoga</b>	<b>1.41</b>	Tsoga is a recycling depot that is a resource in two ways. First, by providing materials and resources that can be re-used, thereby saving money and second, as a tourist attraction to the area, thus improving the community's economy.
<b>Gugasthebe</b>	<b>2.00</b>	It is a venue for arts and culture, bringing the community together for events/functions. Crafts and traditional wear are sold there, making it an attractive venue for tourists. The constraint of this resource, however, is the fact that an entrance fee is charged which excludes those who are unable to afford it.
<b>Shoe-maker/ seller</b>	<b>2.22</b>	This individual teaches others in the community the skills needed to make and sell shoes. A constraint, however, is that there is a lack of materials and funding for these 'learners' to be able to practice and put these skills to use.
<b>Clinic – social workers and counselors</b>	<b>2.34</b>	Counselling services and family help are available at the clinic for those needing access.
<b>Love Life Centre</b>	<b>3.02</b>	This centre houses computer training facilities and runs courses for life skills, family planning, and HIV/Aids awareness, etc. However, it is not open to everyone and so is not considered to be used to its full potential. Also, the programmes appear to be inadequate, according to the group members, because no visible change has been observed since its establishment (for example, teenage pregnancy is still rife in the area).
<b>Computer café</b>	<b>3.15</b>	Access to computers opens doors for people in the community by providing access to wider networks of information and resources (for example, via the internet) and, with the necessary training, creates business opportunities.
<b>Support groups (Clinics)</b>	<b>3.20</b>	These support groups tend to focus around HIV/Aids and TB, making it easier for people with these illnesses to cope.

(continued on pages 166, 167)



<b>Community Resource</b>	<b>P-Index =</b>	<b>Resource</b>
<b>Police station</b>	<b>4.85</b>	While the police station provides a place of safety, as well as a place to go to for trauma counseling (there is one volunteer counselor on duty) if victimised by crime, the community members in the group unanimously felt that the police themselves are far too lax in their duties, doing only the bare minimum of what is required and refusing to go beyond their job-description. They gave the example of a stab victim who ended up dying in the street next to the police station because the police refused to take him to the hospital, claiming instead that it was not their duty but rather that of the ambulance.
<b>Basic computer skills (only some people)</b>	<b>5.96</b>	These skills allow people access to wider networks of information if, for example, they also have access to the computer café. Having these skills also opens up doors for employment opportunities.
<b>Old-age home</b>	<b>6.69</b>	The home is a place for the elderly to go to be cared for when their families are no longer able to support them; however, the homes in Langa are considered 'stagnant.'

The following were mentioned by the groups, but were not given a P-Index value:

### **Individual Skills/Resources Available in the Langa Community**

<b>Tourism</b>	The fact that tour groups pass through the area is considered positive as it makes Langa known and more visible, thereby increasing the chances or potential for community upliftment. Tourists spend money in the area, which aids local businesses and creates more job opportunities.
<b>Woodwork skills &amp; experience</b>	These skills have been passed down from elders within the community and are improved through experience. It is important to note that the skill is learned from others in a mentorship role. The constraint now, however, is that community members are no longer passing on these skills to one another. Furthermore, there is a lack of sufficient resources to enable one to effectively put these skills to use, as in, for example, starting one's own business.
<b>People &amp; communication skills/ Sales &amp; Marketing skills</b>	These are important personal resources in terms of tourism and effective marketing of the area or to market oneself to prospective employers.



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## Individual Skills/Resources Available in the Langa Community

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<b>Private security companies</b>	The visibility of security personnel and vehicles acts as a deterrent for opportunistic criminals, thus improving safety in the area. These companies tend to be used more as the police are trusted less.
<b>Leadership abilities</b>	Could mentor and guide or facilitate groups.
<b>Compassion for children</b>	Could help at the crèche or start another care centre for the children but lack the necessary skills.
<b>Catering skills</b>	Having these skills creates potential for a business opportunity, but the individual noted the constraints as being a lack of funding for capital to start a catering business or to study further in this regard. Also, the individual lacks the knowledge related to business management.
<b>Gardening skills</b>	Allows for the possibility of finding employment opportunities in surrounding residential areas.
<b>Basic business skills</b>	Important in starting one's own business, but it is currently limited.
<b>Skills to offer home-based care</b>	Could start a program to care for elderly who aren't in old-age homes; however, most would not be able to afford this service. More advanced training is required.
<b>Sewing skills</b>	Creates business potential as well as the potential to teach sewing skills. However, a lack of funding and resources has stopped this from going forward.
<b>Knowledge &amp; skill in arts &amp; culture</b>	Could teach or promote as a business opportunity. Knowledge must come from experience, as opposed to studying.
<b>Office administration, organisation &amp; planning</b>	Important tools in the establishment and running of a business.
<b>Instructor</b>	Able to facilitate and run training groups.
<b>Cooking skills/ baker</b>	Could make and sell goods.
<b>Beadwork/ Crafts</b>	Could create and sell goods.

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(Delpont & van Wyk 2008:19-22)

Figure 5.5 below identifies the community needs chart. However, in this case it should be noted that interpretation of P-Index is reversed, meaning that the higher the P-Index the greater the need. For example, with a P-Index of 10 safe houses for children are perceived as being a higher priority than road signs and speed bumps (with a P-Index of 6.23).

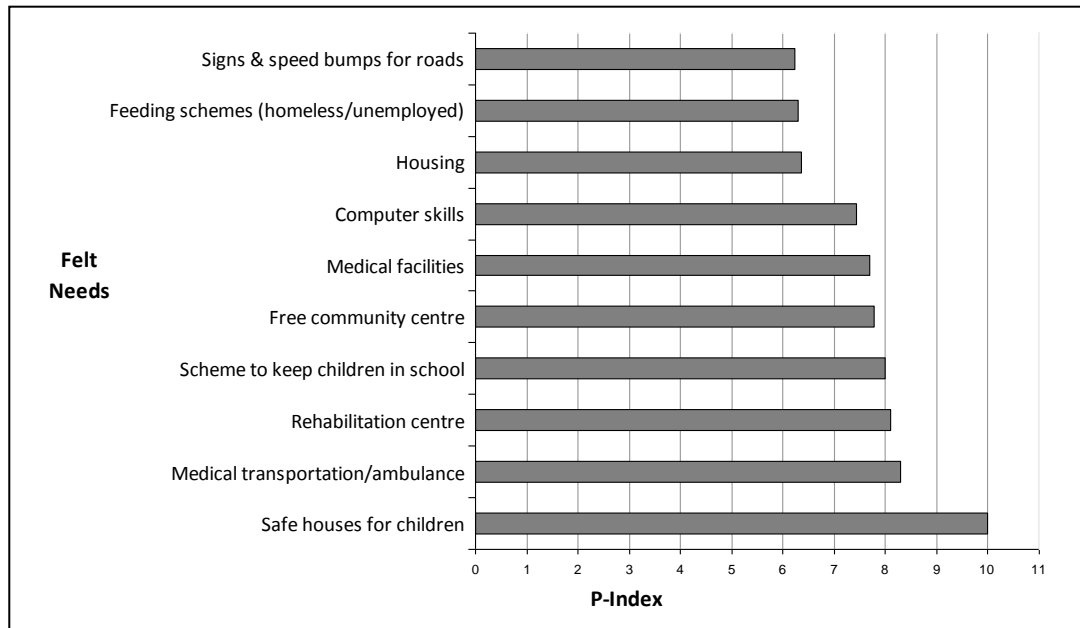


Figure 5.5: Felt needs of the Langa community - 2008 (Delpont & van Wyk 2008:23)

## 7.2.2 Top ten felt community needs in Langa as measured by the P-Index

Table 5.3: Top ten felt community needs in Langa as measured by the P-Index

Felt Community Needs	P-Index =	Resource
1. Safe houses for children & relevant training to run them	10.00	Children are often made to remain in homes where there is ongoing abuse. If they run away from home they often end up living on the streets where they may become targets for predators or become involved in crime. People need to be trained to adequately run these centres.  <i>(Note: While a registered social worker is imperative for this kind of organisation, there may be employment opportunities for general staff as well (e.g. cleaners, cooks, etc.)</i>



<b>Felt Community Needs</b>	<b>P-Index =</b>	<b>Resource</b>
<b>2. Medical transport</b>	<b>8.29</b>	There are no ambulances or medical transport vehicles in the area. So, for example, pregnant women have to use unreliable public transport to get to the hospital.
<b>3. Rehabilitation centre</b>	<b>8.09</b>	Drugs are prevalent among the youth and there is no support for those trying to break free from addictions. The high drug prevalence plays a role in the high crime rate in Langa.
<b>4. Scheme to keep youth in school (to give hope)</b>	<b>8.00</b>	There is a serious problem involving many young people dropping out and leaving school early. They fail to see the point of finishing with no foreseeable future ahead of them due to a lack of employment opportunities.
<b>5. Free Community Centre</b>	<b>7.77</b>	A Community Centre is especially important for young people. Group members indicated that there needs to be a place where young people can keep themselves off the streets and occupied. A place is also needed where the community can come together for activities. While there is a place where this currently happens (Gugusthebe), one has to pay to enter which, in effect, excludes those members of the community who cannot afford it.
<b>6. Medical facilities</b>	<b>7.69</b>	There is currently one clinic in the area, but it is only available to young people up to age 17 or those members of the community who have either HIV/Aids or TB. For general illnesses, people must visit Vanguard Clinic and may then need to wait more than a day to be seen.
<b>7. Computer skills</b>	<b>7.43</b>	Having computer skills would improve one's chances in the employment market and opens chances for self-employment. Many marketplace jobs (with the exception of general labour or factory work) require some basic computer knowledge.
<b>8. Housing</b>	<b>6.36</b>	Many people are still living in shacks and are unable to afford houses due to unemployment. While housing is important, as indicated by the P-Index, it's still lower on the priority scale than "job opportunities," as the latter would be one of the core issues to tackle with the result that as personal income increased, housing would improve.



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<b>Felt Community Needs</b>	<b>P-Index =</b>	<b>Resource</b>
<b>9. Feeding schemes for homeless and unemployed</b>	<b>6.29</b>	Food is needed for daily living. While there are feeding schemes in the schools for the children, homeless and unemployed people do not have money to buy food. Since the majority of the community is living in either relative or extreme poverty, food donations from within the community are rare.
<b>10. Signs &amp; speed bumps for roads</b>	<b>6.23</b>	Drivers tend to speed or drive recklessly down the roads used by school children and other pedestrians.

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(Delpont & van Wyk 2008:24-25)

### **7.2.3 Constraints**

The constraints listed by the group were not specific to any particular resource but rather refer to the situation as a whole. The main constraint, as would be expected, is a lack of *sufficient funding*. While people may have some basic personal skills, for example, they are unable to afford the necessary materials needed for their trade. Furthermore, skills are very elementary, with most having been passed down from previous generations. For individuals to enter into an employment situation there needs to be a more formalised approach to skills training that is cognizant of local market and product requirements.

Within the Langa community there is a sense that people lack *networks or established connections* from within which to operate. They also believe that there is a breakdown in communication among community members. It is important to note that the most common problem mentioned by individuals that



hinders them in using their skills and resources is that they do not know how to find employment for which they are qualified.

People who have adequate skills do not know the *channels* that they can access in seeking employment. In terms of communication, there no longer seems to be a transferring of these essential skills among community members, specifically the younger generations. Thus, only a select few have these personal resources.

A lack of *entrepreneurial facilities and venues* for micro-business was mentioned to be a hindrance. For example, people who were making goods to sell had nowhere to then market and sell their products.

Two of the group members said that *age* was a problem in their search for work. They felt that people would not hire them because they are too old.

It is useful to note that Langa churches in general and St. Francis, a Catholic church more specifically, are considered very highly as trustworthy resources that add value to the community. This means that interventions related to or associated with the local churches will receive more positive community support simply because church's overall standing in the community is very high.

## 7.2.4 Comparison with the 2004 needs assessment in Langa conducted by Stellenbosch University

Comparison of the 2008 needs assessment results for Langa to a similar study conducted by the University of Stellenbosch for Transformation Africa in 2004 (URDR 2004), reveals interesting similarities between the studies, especially regarding the needs that were considered to be of high priority. (See Figure 5.6 below)

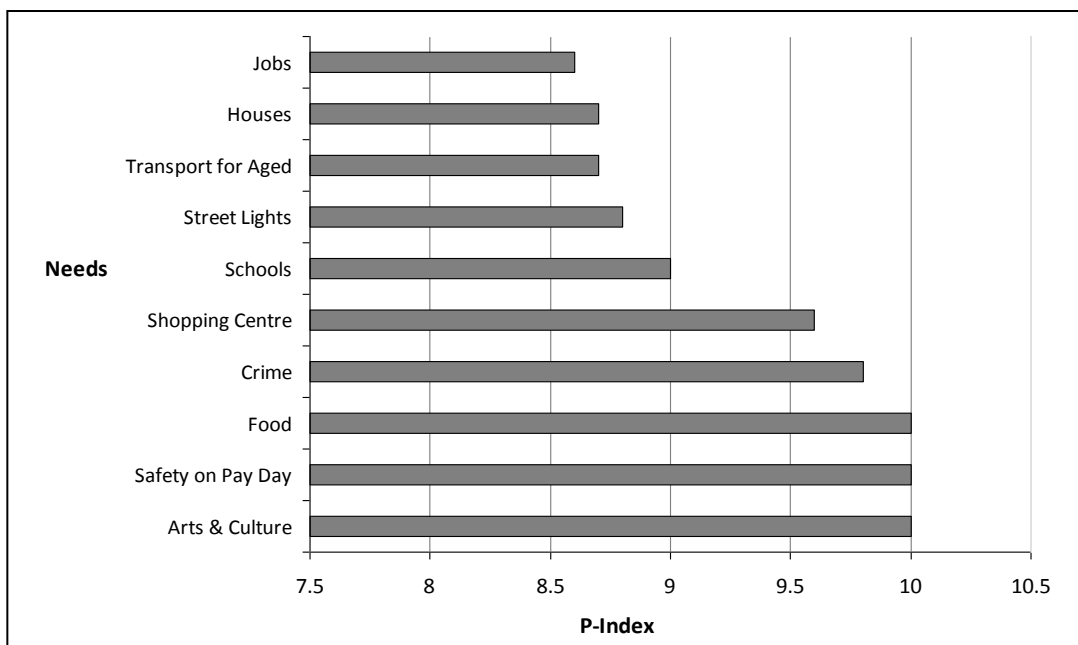


Figure 5.6: The P-Index of the felt needs of the Langa community - 2004 (URDR 2004:26)

It is evident that the Langa community continues to deal with major issues. The two studies identify very similar needs that portray a community struggling corporately and individually. The studies place housing, hunger and elements associated with crime in the 'top ten.' Transport issues, particularly for the elderly, sick or injured were also indicated as being quite important. In addition,

needs of children also rank highly with safe houses for children listed as the greatest need in the 2007 research and schools listed as the 6th highest need in 2004.

But one of the differences is worth noting. Although the P-Index difference is only 3.1, jobs were listed as the 10th highest need in 2004 and ranked 19th in 2007. It was somewhat surprising that jobs did not rank higher in 2007, which one can presumably attribute to the difference in the composition of the focus groups rather than to any other statistical significance since many of the other indicated needs are income-related.

### **7.2.5 Bonding within the community**

Understanding the bonding pattern of a community unlocks access to the community. By noting the community pride (bonding of 7.94 out of 10), and socialisation (indicated by friendship circles bonding of 9.5 out of 10), it seems clear that the marketing approach most likely to be successful in Langa would be word-of-mouth (Delport & van Wyk 2008:28). The same would apply to any fundraising strategy. The Langa community appears very relational, which is in line with the Xhosa culture. Therefore, any intervention would need to focus upon building a reputation within the community through traditional oral means of communication; use of print media should only be a last resort since it would likely be the least effective marketing tool in this context. The intervention would need to identify the *gatekeepers*, *gossipers*, *movers and shakers*, and *flack catchers* of the community—essentially those community

members who seem to have powerful influence. The pride in the community represents a good foundation for an approach that would facilitate the restoration of personal dignity and self-respect. Delpont and van Wyk believe that this is represented by a feeling in the community of ownership visible through community participation. It also indicates why Langa has a reputation as being highly political (2008:28).

An important element of socialisation is that momentum will play a significant role in any course offered, meaning that a small start on a course could eventually lead to full classes later with minimal advertising and effort because of the high regard for friendship circles and thus word-of-mouth advertisement. In the same way, a poorly run course or initiative will suffer for the same reasons. Such socialisation may also significantly impact the job-placement process.

Similarly, bonding can also create some negative indicators. Companies are reluctant to employ too many people from the same family or clan because any significant event in the family, such as a death or serious illness, could impact a large percentage of the workforce, thereby hindering production. Furthermore, dismissal of a member of the family can lead to a larger-than-normal adverse reaction negatively impacting a company.

Low bonding (4.89 out of 10) in terms of social support indicates that there is a perception among members that the community itself will provide little or no

support during a personal crisis. Community communication channels outside of friendship circles appear to be quite poor (Delport & van Wyk 2008:29).

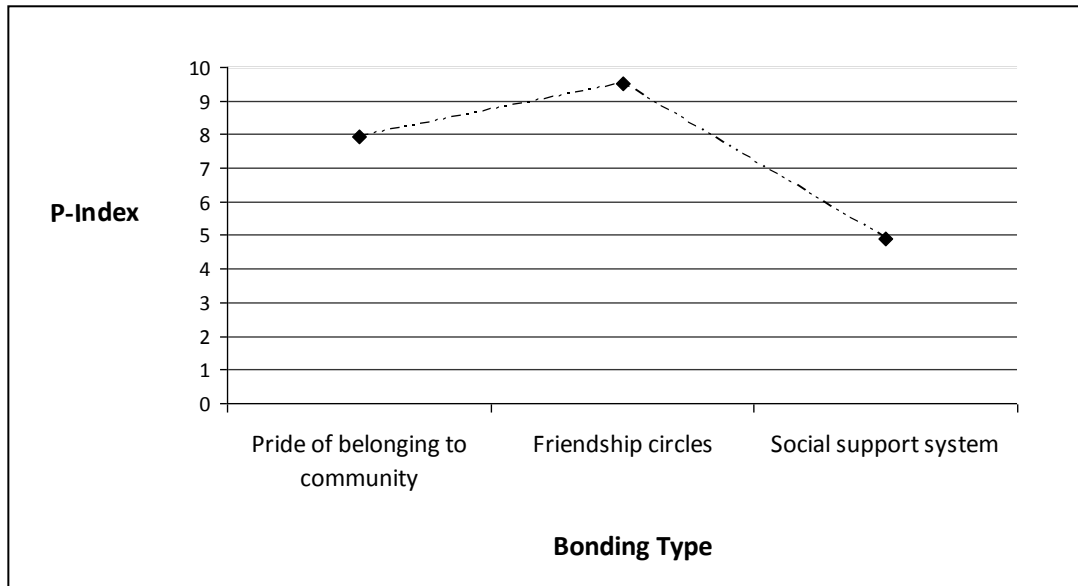


Figure 5.7: Types of social bonding in the Langa community - 2008 (Delport & van Wyk 2008:28)

### 7.2.6 Application

The research findings were reported to the governing body of *Phambili ngeThemba* in February 2008 and it was determined to begin the process of implementing a training strategy for Langa in line with the indicated results. A part-time Training Coordinator was appointed to help develop curriculum suitable for the training course incorporating the following essentials: character and integrity training, self-awareness/discovery and individual value, HIV/Aids awareness, health and hygiene, literacy and numeracy testing, employee rights, constructing CVs, conducting an interview and performing a job search. These elements made up the core of the two-week curriculum. The project was named *Zanokhanyo—‘bringing light’* in Xhosa—and the first training course began in July 2008 at Langa Methodist Church.

Utilising the results from the research helped structure the *Zanokhanyo* project along 3 lines: training, business partnering, and resourcing the course graduates.

### *i Training*

The two-week course requires payment of a subsidised fee of R150.00 per participant. Though this amount does not cover the total costs incurred by the project, it gives perceived value to the course without placing an excessive financial burden on the participant. This vested financial interest also provides incentive for successful completion of the training.

The course simulates a workplace environment where participants are expected to be present and on time every day if they wish to graduate and have access to any job information available through the business partnership network. There is an opportunity to make up a missed day during the next scheduled training course; graduation in this case would happen with the next group. Enforcement of this strict attendance policy by carefully monitoring punctuality and attendance facilitates the 'vetting' of *Zanokhanyo* training graduates for future employers. The participants are also observed throughout the course to see how well they participate in a classroom environment and relate with others. Finally, numeracy and literacy testing helps *Zanokhanyo* personnel assess trainees as well as provide assistance to channel graduates into remedial instruction when necessary.

One of the main goals during the training is to address some of the debilitating effects of apartheid, as discussed in Chapter 3, by helping course participants realise that they are valuable, not because of the colour of their skin nor their cultural heritage, but because they have been created in the image of God. By definition, all men and women are created equal and should be treated as such regardless of previous practices or experiences.

### *ii Business partnership*

'Business partners' are businesses that agree to hire *Zanokhanyo* graduates and allow *Zanokhanyo* personnel to provide mentoring between the employer and employee relationship for an 'after hire' period of 3 months. In return, the businesses will provide feedback on the employee's job performance. Partners, many of whom were respondents to the questionnaires in the research phase, were initially approached as a follow-up and given the first opportunity to hire the people that had been trained according to their own business specifications. Many of these 'partners' indicated surprise that there had been a follow-up to the questionnaire and that their preferred qualities had actually been incorporated into a training curriculum. Consequently, they are often quite eager to fill vacancies with *Zanokhanyo* trained graduates.

### *iii Resourcing*

It was envisioned that the *Zanokhanyo Training and Resource Centre* would become a place that would help graduates take ultimate responsibility for their personal development and employment situation. The centre began simply with

a single computer with internet access and a notice-board with job postings and newspaper job adverts. Graduates are given access to the computer and available information and for nominal fees are permitted to make employment related document copies and send faxes. *Zanokhanyo* personnel are also available to help update CVs and provide additional mentoring or counselling.

In August 2009, the *Zanokhanyo Training and Resource Centre* opened in Epping 1, one of the business communities ‘mapped’ during the research project. On the outskirts of Langa and approximately 300 metres from the Langa train station, this Resource Centre has 5 computers and a copy/scan/fax /print machine for use by graduates at nominal rates. Job adverts from local newspapers and postings by Business Partners are readily accessible in the Centre. Graduates are encouraged to use the computers to set up a personal e-mail account, search/browse the Internet for job openings, learn basic computer skills and update CVs.

#### *iv Zanokhanyo training course*

This two-week course has been designed to address the spiritual and psychological issues critical for charting the way forward for impoverished and traumatised local communities. The course programme is outlined below in Table 5.4:





Table 5.4: Outline of the Zanokhanyo training course

Day	Theme	Content
1	Introduction, "Who am I?" & family	<ul style="list-style-type: none"><li>◆ Introduction of <i>Phambili nge Themba</i></li><li>◆ Participant Introductions</li><li>◆ My family</li><li>◆ Who am I?</li><li>◆ Types of relationships</li></ul>
2	Emotional healing	<ul style="list-style-type: none"><li>◆ How did I get where I am now?</li><li>◆ Feelings and responsibilities</li><li>◆ Anger &amp; guilt</li><li>◆ Forgiveness</li></ul>
3	Character	<ul style="list-style-type: none"><li>◆ Integrity</li><li>◆ The Golden Rule</li><li>◆ Rationalisations</li><li>◆ Types of communication</li><li>◆ Conflict styles</li><li>◆ 'I' messages</li></ul>
4	Problem solving & customer service	<ul style="list-style-type: none"><li>◆ Introduction to Interviews</li><li>◆ Exercises in problem-solving</li><li>◆ Steps to problem-solving</li><li>◆ Customer service</li><li>◆ Literacy testing</li></ul>
5	Human rights, Domestic violence, & HIV/AIDS	<ul style="list-style-type: none"><li>◆ Human Rights</li><li>◆ Domestic violence</li><li>◆ Nutrition and hygiene</li><li>◆ Drugs</li><li>◆ Alcohol</li><li>◆ Facts about HIV/AIDS</li><li>◆ Living with HIV/AIDS</li></ul>
6	Personal finance	<ul style="list-style-type: none"><li>◆ Attitudes to money</li><li>◆ Budgeting</li><li>◆ Debt</li><li>◆ Numeracy test</li></ul>
7	You in the workplace	<ul style="list-style-type: none"><li>◆ In-depth Interviews</li><li>◆ The working environment</li><li>◆ Basic conditions of Employment Act</li></ul>
8	CV's & cover letters	<ul style="list-style-type: none"><li>◆ Your skills and abilities</li><li>◆ Looking for the right fit (matching the person and the job)</li><li>◆ Putting together a CV</li><li>◆ Personal timelines</li><li>◆ Cover letter</li><li>◆ Exercise on cover letters</li></ul>

Day	Theme	Content
9	Phone calls & interviews	<ul style="list-style-type: none"> <li>◆ Individual interview practicals</li> <li>◆ Newspapers &amp; phone calls</li> <li>◆ Introduction to the Resource Centre</li> </ul>
10	Goals & graduation	<ul style="list-style-type: none"> <li>◆ Goal setting</li> <li>◆ Share goals and dreams</li> <li>◆ Reflect on 2 weeks: feedback of course</li> <li>◆ Mentoring questions</li> <li>◆ Celebration and graduation</li> </ul>

(Zanokhanyo Training Workbook)

The training is intended to achieve at least 4 overall goals for the participants:

- Healing and self-discovery
- Spiritual and emotional development
- Numeracy and literacy skills testing
- Placement in an economically viable situation.

In 2008, three courses were completed with 31 total graduates, 10 of whom were placed in jobs by November. Between 5 and 8 graduates missed placement opportunities through the lack of money to return phone calls or travel to interviews. Regrettably, this unfortunate reality was not discovered until after-the-fact.

Those who made appointments through the *Zanokhanyo* office were transported to interviews if needed, facilitating not only a greater hiring percentage but their quick settlement and productivity within jobs when employed. However, as the programme grows it will be unsustainable and undesirable for *Zanokhanyo* staff to have this much continued involvement in

the employment process. The chief desire is for graduates to be empowered to handle this procedure on their own with as little external assistance as possible.

Mentoring is to remain an integral part of the process, but the intention is for this to be something that is requested, not imposed. Graduates must take responsibility for their own development with guidance being available as it becomes necessary and desired. The *Learn to Earn* motto of 'A hand up not a hand out,' is a valuable guide in this developmental process.

As of 1 September 2009, fifty-one people have successfully completed the *Zanokhanyo training course*, with twenty-three currently employed. Although the research has been specific to Langa and the greater Langa business community, as the programme develops the intention is to replicate the training and format so that it can be used in other parts of Cape Town. It is anticipated that another thirty-five learners will successfully complete the basic job-readiness training in 2009; the goal is that at least twenty of these new graduates will become economically viable before the end of the year

The *Zanokhanyo* training is designed to be instructional in two ways. First, to help unemployed people navigate the job-search process so that they can find available work for which they are qualified. But secondly, and as equally important, is to assist people in the process of healing. The damage inflicted upon the majority of the South African population through the machinations of apartheid and generations of deprivation have inflicted brokenness upon individuals who need restoration in order to go forward. They need to realise

that they are valuable both to God and to society and that they have a unique role to play in their community. Such a process is not quick, nor is it easy. But it is essential if South Africa is to claim the heritage that was birthed in 1994.

## 8 Conclusion

It is worth repeating the poignant words of Kothari:

A prime concern of all development efforts should be to generate employment, as a major source of injustice today is not so much in general scarcity, as in the fact that hundreds of millions of people throughout the world find themselves idle and useless, often in the very prime of their youth. (1993:128 in Richards 2003:60)

The *Phambili ngeThemba* research detailed in this chapter has, as its focus, the determination of need on two fronts: first, in the surrounding business community to determine highly sought after character traits and skills in employees, and second, in the Langa residential community to define unmet needs and rate available resources. The results, especially highlighting areas of critical need, provide an invaluable guide map for powerful community transformation.

The results have beneficially guided the interventions of *Phambili ngeThemba* as the organisation seeks to enable and equip people for viable employment opportunities. However, others engaged in follow-up research may find new and alternate ways to be involved in poverty alleviation. Nonetheless, while the daunting challenges that remain in many areas may seem overwhelming, there is significant cause for hope.

The church enjoys significant credibility around South Africa and particularly in the Langa community, ranking at 74 percent as a social institution with the highest level of trust in South African society (URDR 2004:5). This means that interventions connected to churches have an inherent level of credibility that can serve to open doors in the community. Whether they remain open will probably be determined by the quality and usefulness of the project.

In addition, character and integrity, two critical issues that employers are looking for in their employees, are traits that should be foundational to regular church teaching and practice. This is an intervention that is specifically suited for church involvement by its nature.

Lastly, the outcomes of the *Zanokhanyo* training are promising. Nearly half of all course participants have subsequently found employment, suggesting that simply finishing the course in good standing increases the odds of finding employment. As more graduates are placed in the workforce it is expected that that number will rapidly increase; employers are returning for additional graduates as openings become available.

The church has an important role to play in the continuing process of transformation necessary for the rebuilding of society. Much of what is required is in fact spiritual, far more than just rearranging the economy. Mamphela Ramphele defines this work as ‘transcendence ... which is usually associated with the spiritual realm ... [requiring] openness to a radically different frame of

reference; it takes one beyond the known to the unknown, demanding courage and a willingness to take risks' (2008:17). She further observes that mankind is 'framed in significant ways by spiritual and psychological impulses that go beyond material needs' (Ramphela 2008:17). This means much more than just earning money and then becoming a role-player in society because as Ramphela warns '(m)aterial freedom disengaged from inner spiritual freedom puts us at risk of losing the focus on the larger purpose of freedom—freedom to be fully who we can be in our democracy' (2008:18).

## CHAPTER 6

### CONCLUSION

Regardless of what we do or say on Sunday morning, rich Christians who neglect the poor are not the people of God (Sider 2005:60).

This research was undertaken to make a contribution from a Biblical perspective on the church's role in poverty alleviation. It developed as a response to a series of questions that have their basis in a praxis-theory-praxis model—experience leads to reflection which leads to new action. The questions headed Chapters 2-5 and became the framework for discussion.

Chapter 2 answered the question, 'What is happening?' and defined poverty from both a global and South African perspective. Langa statistics defined poverty similarly. Although considered by some difficult to accurately define, poverty is an everyday reality for many people. Its reach is so extensive and its eradication so problematic that those not affected often become dulled to the suffering that it causes. In vivid terms, it often means precarious housing (which is easily destroyed by fire, flooding or earthquakes and without much security from criminals), with large families sharing one or two rooms and often sleeping together on the same bed or on the floor. They are without proper toilets or running water, live near open drains, have meager health care, and little food (Kirk 2002). Over one billion people go to bed hungry or undernourished every night, which especially impacts children: they are prone to disease, stunted in their physical and mental growth and often die prematurely. If they survive they

may be forced into prostitution as teenagers or into hard and monotonous labour in order to scrape together enough to barely survive. Increasingly, they may be orphans trying to hold together a family that has been ravaged by HIV/AIDS, or a grandmother trying to do the same (Kirk 2002).

Rural poverty often drives people to the cities looking for hope. However, the existing infrastructure—housing, sanitation, and transport—is often inadequate to deal with the influx. Among other side-effects, certain forms of crime increase, family support networks break-up and children are often abandoned to the streets, left to fend for themselves. Security is difficult, with drugs and other crime running often unchecked against overextended or uncaring law enforcement.

Poverty is a waste of human resources. There is a sense in which people are abandoned as irrelevant, often being the least educated and without the sufficient training or identifiable skills to ever become economically viable should employment become available. These facts alone make any change in circumstances unlikely—generations are often trapped without hope of escape.

Chapter 3 began with the question, ‘Why is this happening?’ It answered questions around ‘why things are the way they are?’, detailing the inequities that exist in South Africa relating to the impact of apartheid and the legacy that still remains. South Africa has entered into a new democratic dispensation since the first democratic elections held in 1994 and is now governed by a



Constitution hailed by many as one of the most far-reaching Human rights documents in the world. But daunting challenges still remain.

Apartheid has left deep scars upon the psyche of the Nation and prevented the majority of its population from receiving proper education or skills development. Now that legacy is replicating itself as the majority of current teachers are ill-equipped to enable learners to deal with the challenges of modern society. The result is that critical skills jobs go unfilled as health care professionals and engineers, in particular, are in short supply. Poor service delivery is the result which impacts all areas of society, particularly those areas that can least afford it.

Chapter 4 answered the question, 'What should be happening?', looking at a Biblical definition of poverty and God's attitude toward those in poverty. God clearly is the Defender and Supporter of the weak and oppressed, as Scripture often defines the impoverished, and he directs his followers to be the same. The Biblical record clearly guides those claiming to be God's people.

Jesus announced that part of his mission was to bring 'good news to the poor' (Isaiah 61:1) and left an example that set a pattern for the early New Testament church as they cared for each other. Their generosity for one another went to the point that they sold personal property to provide for those in need within their community. But their care extended to others as well, reaching to those outside of the fellowship of believers and reflecting the clear teaching of the Lord to 'love your neighbour as you love yourself' (Matthew 22:39).

Response to these teachings has encouraged modern movements on behalf of the poor, and a few of those were highlighted in this Chapter. Liberation theology and Black liberation theology gave a voice to those often voiceless. These movements grew from a desire that the church engage with those abandoned by society in response to the clear mandate of Jesus. But unfortunately, the call to action was muted by the way action was often undertaken, leaving one with the impression that help for the poor could come at the expense of everything else, changing the 'good news' of the Gospel into a prescription for activities that would be contrary to the teachings of Scripture. And although Evangelicalism may remain more interested in a proper understanding of the Bible, it often fails to practice what it preaches in regards to its treatment of those in poverty.

Chapter 5 answered the question, 'How should we respond?', describing one church's research into the problem of poverty alleviation and then the subsequent intervention that has grown from it. The findings have given helpful insights into the needs of the community, both from the local business perspective and the Langa resident's perspective. Local business is looking for employees that bring good character traits with them to their workplace, qualities such as honesty and integrity, as well as a good work ethic. These are items that can be addressed in a training environment. The Langa community also has resources and strengths which can be accessed.

However, Langa residents face a number of major challenges and constraints which must be addressed, many of them at least indirectly related to poverty

and poor service delivery. The church is highly regarded by Langa residents so, according to the research, interventions that originate from the church will likely have favourable support, at least initially.

There is a way forward for accessing employment opportunities according to the indicated research. Employers have indicated that jobs are available and that they would hire employees that have the character traits they have indicated as being important. There are also service related opportunities available that could provide employment as indicated by the business community research. Entrepreneurial ventures could facilitate these needs, thereby providing additional opportunities for those currently unemployed.

The way forward is challenging. Poverty and the issues that surround it are often intractable, without a clear solution. But the Church, above any institution, should be involved in making a difference. That means that the paradigms of church leaders and congregations must be challenged. The role of the church must be examined in light of the directives of Scripture. Activities should then be focused upon determining the role that each congregation could play in developing sustainable interventions that address poverty and other poverty-related justice issues. Traditionally, this has meant providing services based upon meeting people's immediate needs for survival, something which the church has often done well.

But strategies must be developed that will begin to implement community transformation. Developmental projects can be designed that will enable people

to become self-reliant, although the church will need to prepare for the long term commitment necessary to bring about needed change. Partnerships can also be developed among churches to strategically combine resources toward a common purpose, thereby strengthening the effort of many congregations as they work together toward a goal.

The church has always indicated a desire to bring about spiritual transformation, finding this mandate as a response to the Great Commission voiced by Jesus as he returned to his Father: 'Go therefore and make disciples of all nations ...' (Matthew 28:19a). It is possible that the spiritual transformation so desired by the Church will only come in the measure that the Church responds to the clear Biblical mandate to engage with the desperate needs of the poor.

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g=1fBsUyphebU1M3OELnskJQRB59E&hl=en&ei=FdfMSpY10rXhBrOJsP  
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## APPENDIX 1

### PHAMBILI NGETHEMBA FLYER

**"Going Forward  
with hope"**

**Phambili nge  
Themba**

Contact: **Tim Black (Project manager—Phambili)**  
Phone: 021 531 8972 Fax: 021 531 8972  
E-mail: [tim@reachafrica.org](mailto:tim@reachafrica.org)

Phambili nge Themba was established in 2000 by the Pinelands Methodist Church. One of our core elements is the development of a job skills programme within the Langa Township community, in which we train, equip and develop unemployed persons in various skills (based on market requirements) so that they may become self-supportive and financially independent. While implementing our skills-related training, we aim to develop our graduates socially, spiritually, and emotionally.

We have recently affiliated with Learn to Earn, a skills development organisation, that has successfully pioneered a holistic approach to developing people, with 80% of its graduates becoming economically active.

Currently conducting a thorough community analysis, Phambili nge Themba and Learn to Earn aim to establish a developmental programme that will be market and product determined, optimising potential for future employability.

Your co-operation during this endeavor would be greatly appreciated.

The benefits of such a community analysis for your business are:

- A better resource of potential employees
- Feedback to your business on the results of the business, which can then be applied to your own product.
- Greater understanding of surrounding community and community needs
- A tool for your business to make informed CSI / CSR investments
- Highlighted potential procurement opportunities under BEE

In Association with

**Learn to Earn**  
Est. 1989



A hand up -not a hand out



Contact:

**Keri / Roché** | [learn to earn](http://learn.to.earn) | tel | 021 685 0540 | fax | 021 685 0544 |  
email | [pahq@learntoearn.org.za](mailto:pahq@learntoearn.org.za) | website | [www.learntoearn.org.za](http://www.learntoearn.org.za)

## APPENDIX 2

# GLOBAL POSITIONING SYSTEM [GPS] MAPPING

### Phambili ngeThemba Community Assessment Business Questionnaire

Name of Business: \_\_\_\_\_

Type of Business (e.g. dry cleaner, auto repair): \_\_\_\_\_

Name of Respondent: \_\_\_\_\_

Respondent's Position in Business: \_\_\_\_\_

Contact Numbers: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

GPS MAPPING	
Location (Street name)	
GPS co-ordinates	
GPS site number	



## APPENDIX 3

### BUSINESS INTERVIEWS

**Phambili ngeThemba  
Community Assessment  
Business Questionnaire**

Name of Business: \_\_\_\_\_

Type of Business (e.g. dry cleaner, auto repair):  
\_\_\_\_\_

Name of Respondent: \_\_\_\_\_

Respondent's Position in Business: \_\_\_\_\_

Contact Numbers: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Name of interviewer:** \_\_\_\_\_

**Date of interview:** \_\_\_\_\_

**Time started :** \_\_\_\_\_ **Time Ended:** \_\_\_\_\_

I, \_\_\_\_\_, the undersigned, hereby acknowledge  
consent to the above interview.

\_\_\_\_\_ (Business representative)

Signed



## BUSINESS COMMUNITY SURVEY

### A. Employment Information

i. What is the baseline, entrance-level job in your business? Please give a description of this job.

.....  
.....

ii. What skill is required to be successful in this entrance-level position?

.....

iii. How many of those employed in your business hold entrance-level positions?

.....

### B. Staff Issues and Training Needs

i. What labour/staff issues cause constraints in your business (or this type of business)?

a. Among employees?

.....  
.....  
.....

b. Among other businesses?

.....  
.....  
.....

c. List five qualities that make a good employee in your business.

i .....

ii .....

iii .....

iv .....

v .....

ii. What training needs do your staff have:

a. In terms of knowledge (i.e. Life-skills etc)?

.....  
.....  
.....  
.....

b. In terms of attitude?

.....  
.....  
.....  
.....

c. In terms of external skills (such as carpentry etc)?

.....  
.....  
.....  
.....

iii. Do you have any language or intercultural communication difficulties with your employees? If so, what are they?

.....  
.....  
.....  
.....

iv. Does your business offer or send people for training in these areas of need? If so, who offers this training?

.....  
.....  
.....  
.....

### C. Recruitment and Human Resources

Do you experience any constraints regarding managing Human Resources and Recruitment Functions? Such as:

i. Advertising and finding suitable people (Yes/No)?

.....

ii. Interviewing (Yes/No)?

.....

iii. Assessing résumé's and following up references (Yes/No)?

.....

iv. Job contracts (Yes/No)?

.....

v. Meeting equity targets (BEE) (Yes/No)?

.....

vi. Labour disputes (Yes/No)?

.....

vii. Training of employees, i.e. in language skills (Yes/No)?

.....

### D. Products

In terms of products used in your business, are there any low-tech products that you could outsource - if supplied at good quality and at competitive prices?

.....

.....

.....

.....

### E. Services

Please name the three most important services your business depends on (e.g. courier, cleaning, marketing, printing, catering, contract or seasonal workers, etc).



- i. ....
- ii. ....
- iii. ....

**F. General**

i. In your opinion, what products and services are especially in demand in the Langa/Athlone/Epping area? Why do you say this?

.....

.....

.....

ii. What roles can your business play in creating further business and employment opportunities for unemployed people?

.....

.....

.....

iii. What are the major two or three factors that prevent you from playing these roles?

.....

.....

.....

.....

iv. If you could choose one issue, what, in your business perspective, is the one thing that could improve our situation of unemployment?

.....

.....

.....

**THANK YOU FOR YOUR SUPPORT  
ALL INFORMATION WILL BE KEPT CONFIDENTIAL**

## APPENDIX 4

### NOMINAL (FOCUS) GROUPS INTERVIEWS

Phambili ngeThemba  
Community Assessment  
Focus Groups Questionnaire

#### NEEDS ASSESSMENT USING THE SCHUTTE SCALE:

##### P-INDEX:

##### ESTABLISHING RESOURCES:

1. What resources or skills do the people in the neighbourhood have to offer? (Seeking)
2. Why have you listed the item in question 01? (Qualifying)
3. What resources do you as individuals have to offer in your community?
4. Why do you feel this way?
5. What are the constraints preventing you from offering these resources, or putting these skills to use?

##### MEASURING IMPORTANCE:

6. How important or unimportant is the item in question for the people of Langa?

##### MEASURING SATISFACTION:

7. How satisfied or dissatisfied are you/the people with the situation regarding resources in the community as it is at the moment?

*(The greater the importance/ satisfaction, the further the indicator is moved to the right of the scale, i.e. into the green spots ; the less importance/satisfaction, the further the indicator is moved to the left of the scale, i.e. into the white spots.)*



## **C-INDEX:**

(To calculate C-Index, use question 4 above – only satisfaction is important here; not importance ratings.)

## **BONDING:**

8. To what extent do you consider Langa to be your home? (Pride of belonging to)
9. How close do you feel to your friends in Langa? (Friendship circle)
10. To what extent can you rely on the rest of the community to come to your aid if you would have a problem? (Social support system)

## **NEEDS ASSESSMENT USING THE SCHUTTE SCALE:**

### **P-INDEX:**

#### **ESTABLISHING NEEDS:**

11. What services or facilities do the people in the neighbourhood need? (Seeking)
12. Why have you listed the item in question 01? (Qualifying)
13. What do you as individuals need?
14. Why do you feel this way?
15. What are the constraints preventing you from satisfying this need?

#### **MEASURING IMPORTANCE:**

16. How important or unimportant is the item in question for the people of Langa?

#### **MEASURING SATISFACTION:**

17. How satisfied or dissatisfied are you / the people with the situation regarding (X) in the community as it is at the moment?

*(The greater the importance/ satisfaction, the further the indicator is moved to the right of the scale, i.e. into the green spots ; the less importance / satisfaction, the further the indicator is moved to the left of the scale, i.e. into the white spots.)*

**C-INDEX:**

(To calculate C-Index, use question 14 above – only satisfaction is important here; not importance ratings.)

**BONDING:**

18. To what extent do you consider Langa to be your home? (Pride of belonging to)
19. How close do you feel to your friends in the community? (Friendship circle)
20. To what extent can you rely on the rest of the community